Made with KoreLab

KORELAB USER MANUAL

Complete product reference — every function, in detail

Generated on 29/08/2026

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KoreLab Overview

KoreLab is the management software for artisan food businesses (pasta makers, cheese dairies, pastry shops and the like): it accurately calculates the production cost of recipes and finished products and, where your plan allows, manages quality, HACCP and certifications. Features are organized into modules, gathered into groups in the top menu.

Who it's for

- Pasta makers, cheese dairies, pastry shops and other artisan workshops that turn raw materials into finished products.
- Anyone who needs to know what it really costs to produce a recipe (raw materials, packaging, processing) before setting the price.
- The FBO (Food Business Operator) who has to keep self-control plans, records and certifications in order.
- The consultant who manages the Quality side for several clients.

The menu only shows what your plan includes

- The top menu — and the sections of this manual — show ONLY the groups and features included in your plan: anything your plan does not include simply does not appear.
- You will also find your plan's groups here, grouped by area in the left sidebar: browse them to discover what you can do.
- To view or change your plan go to Account > Upgrade.

Getting started

- Start with the basic master data: in the Catalog group enter your Raw Materials with their purchase costs and the Packaging you use.
- In the Production group create a Bill of materials (the recipe) linking raw materials and packaging: KoreLab adds up the costs and calculates the CPF, your production cost.
- If your plan includes the Quality side, open the Quality group to fill in the self-control manual, the records and the CCPs, and to manage certifications.

What happens

- Master data is shared: update a cost once and it is reflected in every bill of materials and product that uses it.
- When you build a bill of materials or a product, KoreLab automatically calculates the CPF by adding up the linked costs — no manual math.

Back, Forward and page links

- In a browser, each module and each subview or detail shown in the address is added to the history: the browser's Back and Forward buttons retrace the path you visited. A page's own Back button uses the same history; if you opened a link directly with no previous KoreLab page, it returns to the Dashboard.
- The address contains the current module and, where supported, its subview and detail: copying it or reloading the page reopens that position, always after checking your plan and enabled modules. Moving to another subview does not carry over a detail that belongs to the view you left.
- In the mobile app, Back first closes an open menu or overlaid page, then retraces the modules you visited; from the Dashboard, two quick presses exit the app.
- A list's internal state is not written into the address. Product Registry does, however, remember search, filters, sorting, selected rows and scroll position for 8 hours and per account: returning to the page resumes the point where you left off.

Plan notes

- Each plan enables a specific set of groups and features and has quantity limits on master data: if you cannot see a feature, your current plan does not include it.
- You can check your limits and upgrade at any time from Account > Upgrade.

Where to find the Manual

- This User Manual opens from the ? button at the top right (on mobile, from the drop-down menu under ? User Manual): search for the feature you need and follow the step-by-step instructions.
- The sections here on the left follow your plan: you only find guides for the features you can actually use.

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The Create button

At the top right, next to the version number, there is the **Create** button (just on a phone). It opens a list of shortcuts to start something new without going through the menu.

Two kinds of entry, told apart at a glance

- Entries without an arrow — for example New product and New note or deadline — open the form on the spot, leaving you where you are.
- Entries with an arrow > — for example Recipes >, Delivery notes >, Invoices > — take you to the page where that item is created. They do not open a form: they change screen.

The arrow is not decoration: it says the gesture is different, so you do not press expecting a form that will not appear.

How to: choose which entries appear

- Go to Settings > Account > General (or type "quick create" in the Search settings… box).
- Scroll to the Quick create ( ) panel.
- Tick the entries you want in the button and untick the ones you do not use. Changes apply immediately.

The same reminder appears when you hover over the   button.

What you can find in the list

All the main features: products, notes and deadlines, raw materials, packaging, categories, customers, suppliers, recipes, production, warehouse, labels, orders, delivery notes, invoices, receipts, payments, price lists, operators, records and complaints.

Special cases

- Only the entries of the modules your plan includes and that you have left switched on in Settings > Modules appear: a feature you cannot use is not offered at all, neither in the button nor among the settings checkboxes.
- If you tick no entry the   button disappears entirely: that is how you remove it from the top bar.
- New note or deadline requires the Notes module and a Pro plan or above.

INTRODUCTION

Dashboard

The Dashboard is the home screen you see right after logging in: it sums up your workspace numbers at a glance, alerts you when costs (and therefore suggested prices) have changed, shows your latest products and, if certification is active, the Quality overview. It is the program's main tab.

How to read the header

At the top you will find a header with three pieces of information:

- The label Workspace Overview and, below it, your company name (the one set in settings; if none was entered, KoreLab is shown).
- A descriptive line under the name: if your plan manages prices you will see the phrase "Production management, costing, packaging, suppliers and operational monitoring."; otherwise you will see Quality & Certifications Center.
- On the right, a colored pill-shaped label with the plan name in capitals followed by the word PLAN (e.g. FREE PLAN, PRO PLAN). It is informational only.

The key statistics (KPIs)

Right below the header is a grid of tiles with the main numbers. How many tiles you see depends on your plan:

- On plans that manage prices (Free, Starter, Pro) there are four tiles: Products, Raw Materials, Packaging and Prices changed. The last one is green when the value is zero and turns red when there are products with changed costs to review.
- On plans that do NOT manage prices (Quality and Consultant) there are three tiles: Products, Raw Materials and Packaging, without the changes tile. On these plans the counts grid and the product list only appear once you have entered some master data (products, raw materials, packaging or categories).

Below the KPIs, if you have created categories, you will find a grid of tiles (one per category) showing the category name, how many products it contains and how many subcategories it has.

Analytics (Starter plans and above)

On the Starter, Pro and Business plans, next to the KPIs you find the **Food cost trend** card (the average CPF of the product versions saved over the last 6 months) and, below the alerts, the **Analytics** section with two cards: **Margins by price list** (the average margin percentage of each sales price list, computed by comparing resolved prices with the products' CPF) and **Top food cost changes** (the products whose CPF changed the most over the last 6 months, with the before and after values). On the Business plan you also get **Customer orders** (how many are open, their value and how many are ready to invoice; clicking opens the Orders module), **Trimmings in stock** and — when Administration is active — the monthly **Revenue** from issued invoices, **Receivables / payables** highlighting overdue amounts, and recorded **Purchases**. On the Free plan, a card with the **See plans** button appears in place of the chart: the KPI counters remain visible on every plan.

The "Prices changed" alert — how to read it

When the costs of one or more products have changed (because the cost of a linked raw material, packaging item or processing step changed), a yellow warning box appears with the title "Prices changed" followed by the number of products involved (e.g. "1 product" or "3 products"). Inside, each product has a card that tells you clearly what happened:

- If costs went up, the card has a red border and shows "Costs increased" with the percentage (e.g. +5.0%) and the advice "consider updating your selling prices".
- If costs went down, the card has a green border and shows "Costs decreased" with the percentage (e.g. -5.0%) and the advice "you could lower your prices".

Each card compares three values: the **CPF** (the full production cost), the **Wholesale** price and the **Retail** price. For each one the old value is struck through (crossed-out text) and next to it, in bold, is the new value: written in red with a ^{2} arrow if it went up, in green with a ¼ arrow if it went down.

How to — handle a changed price

Under each alert card there are three buttons. Choose the one that fits your case:

- Press Edit if you want to open the product and adjust its data or prices by hand: the product sheet opens in edit mode.
- Press Keep old prices if the new costs do not convince you and you want to keep the selling prices you had.
- Press the button on the right to accept the new calculation. Its label changes with the case: Update prices ‘ if costs went up, Update prices “ if they went down, or Accept if the change is neutral.

What happens

- When you press Edit, KoreLab opens the product in edit mode so you can fix the data directly; the alert remains until you have resolved the change.
- When you press Keep old prices, the alert for that product is dismissed and the selling prices stay as they were, even though costs have changed. In this case the product is flagged as having manual prices: the warning "Manual prices — actual costs may differ" will appear in the list.
- When you press Update prices (or Accept), the alert for that product is dismissed and the new cost calculation is applied.
- In both cases your choice is saved on the product. When no products are left to review, the yellow box disappears and the Prices changed KPI tile turns green again.

Recent products

Below the alerts you will find the list of your latest products. The block is titled **Recent Products** on plans with prices, or **Products (master data)** on Quality/Consultant plans. At most the latest 8 products are shown, newest first.

- Each row shows the product name and, if assigned, its category.
- On plans with prices, the CPF, Wholesale and Retail values appear on the right of each row. If Production Mode is active, the Wholesale and Retail prices are hidden and only the CPF remains.
- If you chose to keep a product's prices manually, the warning "Manual prices — actual costs may differ" appears under its name.
- Click any row to open that product in edit mode.

When you have no products yet

If you have not entered any products, instead of the list you will see a box with an icon, the message **No products found** and the prompt "Start by creating your first product in the catalog". Press the **Create first product** button to create one and get going right away.

The Quality & Certifications section

If your plan includes certification (Pro, Quality, Consultant, or Free/Starter with the Certifications add-on), the Dashboard also shows a section titled **Quality & Certifications**. Next to the title is the **Open Certifications >** button, which takes you straight to the Certifications module. While the data loads you may briefly see the message "óLoading the Quality overview…".

If you have at least one active standard in your certification file, you will see a grid of indicators:

- Active standards: how many standards you have activated; underneath, their short codes separated by a dot (e.g. HACCP · BRC).
- Compliant requirements: the percentage of compliant requirements out of all applicable ones; the detail "compliant/applicable applicable" is written underneath. It turns green once you reach at least 95%.
- Open NCs: how many non-conformities are still open or in progress. It is green with the label "none" if there are zero, red with "to manage" if there are any.
- Deadlines <=30 days: how many audits and obligations are due within 30 days (the label "audits + obligations" appears underneath). Green if none, amber if there are any.
- Manual: how many sections of the self-control Manual you have filled in ("sections completed" appears underneath).
- Consultant proposals (shown to the client only, not to the consultant): how many change proposals sent by your consultant are awaiting approval. It is purple with "to approve" if there are any, green with "none pending" if there are none.

When you have no active standards yet

If you have certification but have not activated any standard yet, instead of the indicators you will see a box with the message **No active standards** and the prompt "Activate HACCP (mandatory) and the certifications you need to start gap analysis, manual and records.". From there, the **Go to Certifications >** button takes you to the module to get started. Note: this empty-state box appears for the client, not for the consultant.

Notes for the Consultant plan

If you are a consultant, above the indicators you will see a light-blue box titled **Your clients** summarizing, in one line, how many clients have delegated to you and how many proposals you have sent that are awaiting the FBO's signature (e.g. "3 delegating clients · 2 proposals awaiting FBO signature").

- If you have clients, you will see their name labels (up to 8; if there are more, "+N" appears with the count of the others). If a client has no saved name, the label shows "Client · " followed by a shortened code.
- If you have no clients yet, the box explains what to do: "No clients yet. Get invited by a client and accept the delegation in Certifications.".

Special cases

- Production Mode, when active on commercial plans (Free/Starter/Pro), shows an amber banner at the top — "Production Mode active — wholesale/retail prices hidden" — and hides selling prices (Wholesale and Retail) throughout the Dashboard, leaving only the CPF.
- Compact Mode reduces spacing and sizes, but the features and buttons stay the same.
- The Quality section numbers always refer to your own certification file (your tenant): delegated access to a client is not applied on the Dashboard, even if you are a consultant.

Plans and Subscriptions

KoreLab is used with a subscription plan: the plan determines how many items you can create (products, recipes, suppliers, raw materials, packaging, categories) and which features are enabled. Everything is managed from the **Choose Your Plan** page (the Upgrade screen), where you can see your current plan, compare plans and activate a subscription with secure payment through Stripe.

The available plans

KoreLab has five plans plus an add-on. Below are the exact prices and limits, taken from the application's configuration.

- Free: free of charge (€0). Limits: 5 products, 5 recipes, 5 suppliers, 5 raw materials, 5 packaging, 3 categories. Features: Excel export. Does not include PDF export, statistics or AI.
- Starter: €9.90/month or €99.00/year. Limits: 20 products, unlimited recipes, 25 suppliers, 45 raw materials, 15 packaging, 5 categories. Features: Excel export, PDF export, statistics.
- Quality: €24.90/month or €249.00/year. All limits unlimited. It is the Quality & Certifications-only plan (no prices, price lists or margins): HACCP, IFS and BRC suite, records, CCPs and critical limits, assessments, food defense, warehouse and lot traceability, the master data and bills of materials certification requires, manual and PDF dossier. Includes Certification.
- Pro: €34.90/month or €349.00/year. All limits unlimited. It is the "all-inclusive" plan: Excel export, PDF export, statistics and AI. The Certifications suite is already included in Pro. Its card carries the Most Popular badge.
- Consultant: €39/month or €390/year. All limits unlimited. It is the plan for the HACCP consultant: Quality & Certifications side only, multi-client, with the ability to work on your own machine and sync with the client (feature marked as coming soon). Includes Certification.

Plan notes

- The prices shown on the cards are WITHOUT VAT: next to each amount you will see the + VAT note. VAT is calculated and shown at payment time (checkout).
- The Pro, Quality and Consultant plans have all limits unlimited: in that case the current-plan box shows the notice All resources unlimited instead of the numbers.
- Advanced features depend on the plan: PDF export and statistics start from Starter; AI is Pro-only.

The Certifications add-on

The Certifications add-on unlocks the entire Quality & Certifications suite on any plan: HACCP self-control, IFS Food, BRCGS, operational records, warehouse and traceability (one-step-back/forward, mock recall), supplier and food-contact-materials (MOCA) assessments, food defense, manual and PDF dossier. It costs +€19/month or €190/year (full price — the Early Adopter promo does not apply to the add-on). It is designed for those on Free or Starter who want to add the certification side without changing plan. On Pro it is already included (the card shows the label **included in the Pro plan**), and for the Quality and Consultant plans it is the plan itself: in those cases the box shows the message **Already active in your plan** and there is nothing to add.

How to — upgrade to a higher plan

- Open the Choose Your Plan page.
- At the top you will find the Current Plan box, with the plan name and your current limits (or the All resources unlimited notice if the plan is unlimited).
- If you want to pay yearly instead of monthly, use the toggle at the top center between Monthly and Annual. The -17% saving is shown next to Annual.
- In the plan grid, find the one you are interested in. The card shows the price, the billing period and the list of included features.
- Press the plan's button, for example Upgrade to Pro > (the text combines "Upgrade to" with the name of the chosen plan).
- Stripe's secure payment page opens: enter your payment details. VAT is added and shown here.
- Once payment is complete you are brought back to KoreLab; on return the app detects the outcome (on success the address contains "upgrade=success", if you cancel "upgrade=cancelled").

How to — add the Certifications add-on

- On the Choose Your Plan page scroll down to the Certifications add-on box.
- If the suite is not yet unlocked on your plan, press Add Certification (€19/month) > (with the toggle on Annual the button becomes Add Certification (€190/year) >).
- You are taken to Stripe's payment page to activate the add-on; when done, the Quality & Certifications suite is unlocked.

What happens

- The upgrade button and the add-on button always lead to Stripe's payment page: KoreLab never handles your card details directly.
- On the plan you are already using, the label Current Plan appears instead of the button: you cannot "re-buy" your current plan.
- Once the subscription is active, the new plan's limits apply immediately and the plan's features (PDF export, statistics, AI, Certifications suite) are enabled according to what is included.
- VAT is not included in the card prices: it is calculated and applied at checkout, based on the details you enter.

Special cases

- Some activations may not be available self-service yet: in that case, instead of the payment button the card shows Available soon · request > and opens a pre-filled email to support. For the add-on the alternative is Add Certification · request >.
- Early Adopter promo: if your account is eligible (registered by 31/10/2026), the paid plan cards show the -25% Early Adopter badge, with the full price struck through and the discounted one highlighted. The discount is applied automatically at checkout on the paid plans (Starter, Quality, Pro, Consultant), NOT on the Certifications add-on.
- When you choose annual billing, the equivalent monthly amount is shown below the price; with monthly billing you will instead find the annual alternative ("or €… + VAT/yr · save 2 months").
- Only the Starter and Pro cards, in Annual mode, also show the euro savings badge (Starter "Save €19.80", Pro "Save €49.80").

Billing, VAT and contacts

- All prices are shown excluding VAT; tax is added at payment time.
- At the bottom of the Choose Your Plan page you will find the VAT notes and rates: 22% for Italian customers, variable for EU customers, 0% for non-EU customers.
- For help with activations, billing or VAT rates write to info@cvproject.it (the address is shown at the bottom of the page, in the "Questions? Write to" line).

Cancellation

The subscription is managed through Stripe. To change or cancel your subscription, or for billing questions, refer to your account's subscription management and, if needed, contact support at info@cvproject.it, the address shown at the bottom of the **Choose Your Plan** page.

Privacy & GDPR

The Privacy and Security section contains the full privacy notice on the processing of personal data under EU Regulation 2016/679 (GDPR) and Italian Legislative Decree 196/2003 (the Italian Privacy Code). You open it from the menu under **Privacy & GDPR**; once inside, the page shows the title **Privacy Policy & GDPR** at the top, followed by every topic, each in its own numbered box.

Mind the two names

- In the navigation menu the entry is called Privacy & GDPR: that is what you click to open the section.
- Inside the page, at the top, the title is written in full as Privacy Policy & GDPR: it is the same page, just with a fuller heading.

What the page contains

The page opens with the title **Privacy Policy & GDPR** and an introductory line referencing EU Regulation 2016/679 (GDPR) and Legislative Decree 196/2003 (Italian Privacy Code). Note before you read on: **the notice itself is published in Italian only** — the boxes listed below are not translated and stay in Italian even when the app is set to English, and the page shows a notice above them saying so. What is available in English is Annex C of the Data Processing Agreement, the list of Sub-processors, reachable from the same page (see "Third-party providers and where data goes" below). Below the introductory line you will find all the topic boxes in the following order:

- 1. Data Controller
- 2. Types of Data Collected
- 3. Purposes and Legal Basis of Processing
- 4. Data Retention
- 5. Data Sharing with Third Parties
- 5-bis. Controlled sharing of the certification file with the consultant/auditor
- 6. Rights of the Data Subject
- 7. Cookies and Tracking Technologies
- 8. Data Security
- 9. International Transfers
- 10. Minors
- 11. Changes to the Privacy Policy
- 12. Supervisory Authority

At the bottom of the page, in a centered light-blue box, the contact reference is repeated: **info@cvproject.it** with the note "Guaranteed response within 30 days".

Who the Controller is and who to write to

The **1. Data Controller** box names CV Project S.r.l., with email info@cvproject.it and website https://korelab.app. The box also gives the registered office, the VAT number and the company's certified email (PEC) address. This is the party to contact for any matter concerning your data.

What data KoreLab processes

The **2. Types of Data Collected** box lists the categories processed:

- Identification data: first name, last name, email address
- Company data: company name, VAT number, SDI code, PEC, address
- Usage data: products, recipes, raw materials and suppliers entered by the user
- Payment data: handled exclusively by Stripe (PCI DSS compliant), with KoreLab never storing credit card data
- Content sent to the AI assistant: the questions and data you choose to submit to KoreLab AI
- Technical data: IP address, browser, operating system, security logs, to keep the service running and secure. The notice states that KoreLab uses no third-party analytics or profiling tools

Why data is processed

The **3. Purposes and Legal Basis of Processing** box explains that data is used to: deliver the KoreLab service (performance of the contract, Art. 6.1.b GDPR); manage subscriptions and billing (legal obligation, Art. 6.1.c GDPR); send the necessary service communications, such as account confirmation or password recovery (performance of the contract, Art. 6.1.b GDPR); improve the service and its security (legitimate interest, Art. 6.1.f GDPR); send marketing communications only if you gave explicit consent when signing up — it is optional and you can withdraw it at any time, from the unsubscribe link in every email or by writing to info@cvproject.it (consent, Art. 6.1.a GDPR).

How long data is kept

The **4. Data Retention** box sets the retention periods:

- Account data: until the user deletes the account
- Billing data: 10 years, as required by Italian tax law
- Technical data and logs: 12 months at most

After account deletion, data is removed from the systems within 30 days, except where legal obligations apply.

Third-party providers and where data goes

The **5. Data Sharing with Third Parties** box declares the external services used.

The list is not copied here: it changes as the providers change, and a copy in the manual would sooner or later contradict the privacy notice. Start from Annex C of the Data Processing Agreement, which is **available in English** and carries the full detail for each provider — function performed, region, transfer mechanism: open it from **Privacy & GDPR** with the **Sub-processors in use** button, or by downloading the DPA PDF from the same page. The same providers are also listed in box 5 of the privacy notice, but mind that **the extended notice is published in Italian only**: its boxes are not translated and stay in Italian even when the app is set to English. A notice above them on the Privacy & GDPR page says so.

All providers are GDPR compliant through Standard Contractual Clauses (SCC). Data is never sold or handed over to third parties for advertising purposes.

Sharing the certification file with your consultant or auditor

The **5-bis. Controlled sharing of the certification file with the consultant/auditor** box describes a feature that is always initiated by the company: generating a "snapshot" — a read-only, immutable, point-in-time copy of the certification file — to share with your HACCP consultant (first-party audit) via a revocable, expiring link.

- What it contains: certification status (requirements, manual, limits/CCPs) and operational records, including the operator's name and any simple electronic signature (PIN) of whoever made the entry. It does not include raw re-import data or secrets: PINs are never included.
- Legal basis: performance of the consulting contract or the company's legitimate interest (Art. 6.1.b/f GDPR). Sharing is decided and activated exclusively by the company.
- Roles: KoreLab processes the data as the company's processor (Art. 28 GDPR); the consultant is a recipient designated by the company and receives a static snapshot, not real-time access.
- Duration and revocation: the link has an expiry set by the company and can be revoked at any time. Revocation prevents new openings but cannot erase copies the consultant may have already downloaded.
- Logging (Art. 30): the company records the snapshot's creation and the number of openings. The consultant's IP addresses are not collected.
- Retention: the shared copy is deleted when the link expires or is revoked; opening logs are kept for 12 months at most.

The snapshot is evidence with internal probative value, not a certification, and it replaces neither the consultant's work nor qualified signatures.

Where the consultant link is actually created

Box 5-bis explains the feature from a privacy standpoint, but the link is not created from the Privacy page: it is created in the Certifications module, in the Settings tab, in the **Send to your HACCP consultant (expiring link)** box. The feature requires a cloud account: in local mode, without access, a notice appears in its place suggesting you use the historical ZIP archive instead.

- Go to Quality > Settings and scroll down to the Send to your HACCP consultant (expiring link) box.
- In the Consultant name/reference field type a reference, e.g. "Studio Rossi — June" (it is just a label to find the link again).
- In the Expiry menu choose the duration: 7 days, 14 days or 30 days. The default is 14 days.
- Press Create link. While processing, the button shows "Creating…".
- The link appears in a green box with a note that this is the only time you will see it: use the Copy button to copy it and send it to your consultant. The expiry date is shown underneath ("Expires on …").

What happens after you create the link

- The link and its opening count are listed under Links created, with the creation date, the expiry date and the number of openings (plus the date of the last opening, if any).
- Each link has a status shown as a label: active, expired or revoked.
- While the link is active, the Revoke button is shown. Pressing it opens a confirmation dialog warning that the consultant will no longer be able to open it and that any copies already downloaded remain in their possession.
- The consultant opens the link in a browser, without an account, and independently verifies the integrity (signature + seal) of a static snapshot: they do not access your live data.

Your rights as a data subject

The **6. Rights of the Data Subject** box recalls Arts. 15-22 GDPR and the rights you can exercise:

- Access: obtain a copy of your personal data
- Rectification: correct inaccurate data
- Erasure, the so-called right to be forgotten: request the deletion of your data
- Portability: receive your data in a structured format, JSON or CSV
- Objection: object to processing on legitimate grounds
- Restriction: request the restriction of processing

The same box specifies that portability (Art. 20) and erasure (Art. 17) can be exercised on your own from within the app, in the "Exercise your rights" box described below, while for the other rights you write to info@cvproject.it, with a response within 30 days.

How to export your data or delete your account (self-service)

At the top, the Privacy & GDPR page contains the **"Exercise your rights"** box, from which you can act on your own, without waiting for an email reply:

- Download my data (portability, Art. 20): a button exports everything you have entered (products, recipes, raw materials, suppliers, records…) into a single JSON file. Only credentials/tokens and internal logs are excluded.
- Delete account and all data (erasure, Art. 17): an irreversible operation with 3 mandatory steps — first you download a full backup, then you type the word ELIMINA, and finally you confirm. Only then are the account and its data deleted.

Alternatively, or if you cannot access the app, you can write to **info@cvproject.it** (response within 30 days) or use the public page **app.korelab.app/privacy.html** ("Account and data deletion" section).

What happens after a request

For a deletion request, data is removed from the systems within 30 days, except billing data, which is kept for the 10 years required by Italian tax law. For a portability request you receive your data in a structured format (JSON or CSV). Every request is answered within 30 days.

Cookies and tracking

The **7. Cookies and Tracking Technologies** box clarifies that KoreLab only uses technical cookies needed for operation (authentication, preferences) and LocalStorage to store the user session. No profiling, advertising or third-party tracking cookies are used. Technical cookies do not require consent (Art. 122 of the Italian Privacy Code). The same box notes that on the sign-in pages and on the public consent-collection forms, when anti-abuse protection is enabled, Cloudflare's "Turnstile" verification widget is loaded: it serves technical and security purposes only, and does not profile or track for advertising.

Data security: encryption and RLS

The **8. Data Security** box lists the technical and organizational measures in place:

- TLS/HTTPS encryption for all communications
- Database encrypted at rest on Supabase
- Row Level Security (RLS): each user can only access their own data
- Secure authentication with JWT tokens
- No payment data stored, since everything is handled by Stripe
- Automatic database backups

International transfers

The **9. International Transfers** box notes that the database, authentication (Supabase) and the collection of technical errors (Sentry) remain within the European Union, while some other providers — those listed in box 5 — may process data in the USA or on globally distributed networks. These transfers comply with the GDPR through Standard Contractual Clauses (SCC) approved by the European Commission and Data Processing Agreements (DPA) signed with each provider.

Minors

The **10. Minors** box specifies that KoreLab is intended for professionals and companies and does not knowingly collect data from anyone under 18. Parents or guardians who believe a minor has provided personal data can contact info@cvproject.it.

Policy updates

The **11. Changes to the Privacy Policy** box states that CV Project may update the notice and that the updated version is always available on this page, with the date of the last change: it is the page, not a notification reaching you, the source to consult to find out what changed.

The same box keeps two things apart that are easy to confuse:

- The prior notice of at least fifteen days to object to the addition or replacement of a processor is provided for by Article 12(4) of the Data Processing Agreement (DPA): it is a contractual commitment of CV Project, carried out outside the application (email or reserved area), not an automatic KoreLab feature.
- The request to accept the new version of the DPA, which the app shows you on access, comes afterwards, once that version is already in force. Seeing it appear is therefore not the same as having received the prior notice, and accepting it so you can keep working does not cost you the right to object.

You can object to the use of a processor, or ask for clarification, at any time — including after accepting — by writing to info@cvproject.it: the DPA (Article 12(5)) then provides for disabling the affected feature where technically possible, ceasing the affected part of the service, or terminating without penalties for the subsequent period.

At the bottom of the box are the version of the notice and the date of the last change.

Complaints to the Supervisory Authority

The **12. Supervisory Authority** box reminds you that, if your rights are violated, you can lodge a complaint with the Garante per la Protezione dei Dati Personali (the Italian Data Protection Authority), based at Piazza Venezia 11, 00187 Rome, phone +39 06 69677 1, website www.garanteprivacy.it.

Important notes

- The Privacy & GDPR page is not read-only: at the top it contains the "Exercise your rights" box with buttons to download your data (JSON) and delete your account on your own (with a mandatory backup and double "ELIMINA" confirmation). The same notice is publicly available, without login, at app.korelab.app/privacy.html, which also includes the deletion steps.
- The link to share with your consultant is not created from this page, but from the Send to your HACCP consultant (expiring link)

box in Quality > Settings.

- The certification-file snapshot shared with the consultant is not a certification and does not replace qualified signatures: it serves as internal evidence, and its signatures are simple electronic signatures (PIN), not qualified ones.
- Payment data never passes through KoreLab: cards are handled entirely by Stripe.

CATALOG

Raw Materials

The Raw Materials catalog is where you record every ingredient you use in production, with its unit of measure and cost: it is the starting point for calculating the costs of your finished products. The section is in the **Raw Materials** tab (the panel header is é**Raw Materials**).

At the top of the section there is a green box labelled **Cascade update**, which signals the automatic recalculation. The catalog rows are sorted automatically by name (Italian alphabetical order).

How to — add a raw material

- Scroll to the bottom of the list, down to the New raw material block.
- In the Name field type the ingredient name (the field shows the placeholder "New ingredient…").
- Choose the Unit from the drop-down menu: the available values are Kg, L, pz, g, ml.
- Enter the Default cost (the field is numeric, with a 0.001 step and a minimum of 0).
- If you wish, fill in the three fields below: Label name… (the designation used in the ingredient list on the label), Producer… and Origin (e.g. Italy, EU)….
- Press the Add button, or the Enter key while you are in the Name or Default cost field.

What happens — on save

- The raw material is saved to the cloud immediately and appears in the list, repositioned in alphabetical order.
- If the Name field is empty, the ingredient is not added (the button does nothing).
- The additional text fields (Label name, Producer, Origin) clear themselves and stay ready for the next entry.

How to — edit an existing raw material

- Locate the ingredient's row in the list.
- Edit the fields directly inline: Name, Unit and Default cost.
- Below the name you can also correct Label name, Producer and Origin.
- Changes to the text fields and to the Default cost are saved when you leave the field (on focus loss); a change of Unit is saved as soon as you select it.

To delete an ingredient use the red **** button at the end of the row: the raw material is removed from the catalog immediately.

What happens — the cascade recalculation

When you save a change to the catalog (in particular to the **Default cost**), KoreLab automatically recalculates the costs of the finished products that use that ingredient: you don't have to redo the sums by hand. This is the automation signalled by the green **Cascade update** box at the top. If at least one product changes cost, a notice like " N products updated" appears (N being the number of recalculated products) and those products are saved again; if no product is affected, you see the normal save-success message. This is why it pays to keep the **Default cost** always aligned with the real price.

Suppliers per ingredient

Each raw material can have several suppliers, each with its own price. On the ingredient's row you find the **** button followed by a number: the number tells how many suppliers are already linked, and the button becomes coloured (solid background) when there is at least one. If a default supplier is set, a row appears under the name with the icon, the supplier's name and its price.

How to — manage an ingredient's suppliers

- On the raw material's row press the button (tooltip on hover: "Suppliers") to open the light-blue panel Suppliers — [ingredient name].
- If there are no suppliers yet, you see the message "No supplier linked.".
- To add one, pick from the — Select supplier — menu, enter the Cost/unit, select the unit from the menu beside it and, if you want

it to become the reference supplier, tick the Default box.
- Press + Add.
- Each linked supplier shows its price per unit in the "price/unit" format and, when set, the delivery time with the ñ icon (e.g. "ñ 3gg", i.e. 3 days). The default supplier is marked with the DEFAULT label.
- To remove a supplier from the ingredient use the red button next to it.

The supplier with the **Default** tick (shown with the **DEFAULT** badge in the panel) is the one considered the default for that ingredient and appears under the name on the catalog row, with its price.

Nutritional values — the button

On each row, next to the suppliers button, there is the ** **button (tooltip: "Nutritional values per 100g"). Opening it takes you to the purple panel** Nutritional values per 100g — [ingredient name]**, where you can enter the macro-nutrients, the allergens and the label data. When an ingredient has nutritional values entered (and is not marked as not relevant), the note " nutritional values entered" appears under its name. The full workings of this panel (CREA Database search, Ingredient Intelligence with Open Food Facts/USDA, allergens and compound ingredients) are described in the Automatic Nutrition section of the manual.

How to — exclude an ingredient from the nutritional calculation

- Open the ingredient's panel.
- At the top right press the Not relevant button.
- When active, the button shows " Not relevant" and the box "Ingredient excluded from the nutritional calculation (yeast, flavourings, colourings, etc.)" appears. The nutritional fields and the allergens stay hidden as long as you leave this state on.
- To bring it back into the calculation, press the same button again to switch "Not relevant" off.

Special cases

- Label designation: if you fill in Label name, that wording is used in the ingredient list; otherwise the Name is used.
- Origin: the Origin field is meant for the geographical wording (e.g. Italy, EU) and is used on the label when QUID is enabled.
- Compound ingredient: an ingredient can contain sub-ingredients; when you enable this (from the checkbox in the panel), the " Compound" indication appears on the catalog row.

Table view, multi-select and bulk edits

- With the buttons at the top you switch between the card view and the TABLE view (sortable by clicking the headers); Export viewdownloads to CSV exactly the rows you are looking at.
- In the table view every row has a checkbox: selecting one or more raw materials brings up the actions bar, which always states how many rows it is about to act on — Archive/ Reactivate, Master data fields…(Producer, Origin, Minimum stock: you fill in only the fields you want to change, the others stay untouched on every row) and Export selection.
- Cost and allergens are NOT bulk-editable: they feed the cascade recalculation of product costs and the labels, so they change only from the single row or from the nutritional panel.

Archiving a raw material

- The Archivebutton on the row (or the bulk action from the selection) removes the raw material from the operational lists WITHOUT deleting it: it stays in bills of materials, lots and traceability.
- The Show archivedbutton at the top (with the count) brings them back, marked ARCHIVED, so you can consult them or bring them back with Reactivate.
- An archived raw material also disappears from every place where you used to pick it — recipe/BOM ingredients, warehouse loads, supplier orders, evaluations and HACCP analysis — and no longer triggers low-stock alerts (menu badge, Quality dashboard, Deadlines, notifications). Recipes and lots that already use it stay intact; reactivate it and it comes back everywhere.

Plan notes

- Per-ingredient suppliers are limited on the Free plan: you can link only one supplier per raw material; when you try to add a second one, the prompt to move to a higher plan opens (the request is not saved).
- The external nutritional search Ingredient Intelligence (Open Food Facts / USDA) is reserved for the Pro plan; on the other plans,

in the panel, an invitation with a Pro button leading to the upgrade appears in place of the search box. The search in the local CREA Database remains available on all plans.
- Supplier management is available only if the Suppliers module is on: when it is not, the button and the default-supplier row are not shown on the catalog row.

CATALOG

Automatic Nutrition (CREA / OFF / USDA)

Automatic Nutrition finds an ingredient's nutritional values on its own, looking them up first in the Italian CREA database and, on the Pro plan, also in the external Open Food Facts and USDA databases: you find it in the panel opened with the button on each raw material, in Raw Materials (the ë Raw Materials card, the list of your raw materials with name, unit and cost).

The panel calculates and stores the values per 100 g of the single ingredient. From these, KoreLab then automatically derives the nutrition declaration of the whole finished product in the Technical Sheet.

How to

- Open Raw Materials and locate the ingredient in the list.
- Press the button (title on hover: "Nutritional values per 100g") next to that ingredient: the purple panel Nutritional values per 100g followed by the ingredient name opens.
- On opening, an automatic search in the CREA database starts right away: you see the message Searching… and shortly after the list of matches in the green CREA Database box (badge Local, "81 basic Italian ingredients").
- For each result you can read the name, the category, the main macronutrients (kcal, protein, fat, carbs, fibre) and any allergens preceded by , plus a badge with the percentage and the confidence label: High, Medium or Low.
- Link the right value by pressing the button on its row: it reads Link when confidence is high, Confirm when it needs checking. Once chosen, the ingredient shows as Linked to the CREA database with the confidence percentage; to redo it press Change.
- If you find nothing suitable and you are on the Pro plan, use the external search in the Ingredient Intelligence box just below: the field is pre-filled with the ingredient name, edit it if needed (e.g. "E.g.: hazelnut, butter, wheat flour...") and press Search.
- From the external results pick the correct entry and press Import: you see the Imported: confirmation followed by the name.
- Check the eight numeric fields Energy (kcal), Fat (g), of which saturates (g), Carbohydrates (g), of which sugars (g), Fibre (g), Protein (g) and Salt (g): they fill in by themselves with the chosen value, but you can always correct them by hand.
- Press Close to close the panel. The ingredient now shows the nutritional values entered note in the list.

What happens

- The CREA search starts automatically every time you open the panel of an ingredient not yet linked: you don't have to press any button to start it.
- The confidence badge follows precise thresholds: High from 95% up (the result also carries the Auto mark and the button becomes Link), Medium from 80% to 94% (Confirm button), Low below 80%.
- When you press Link or Confirm, KoreLab copies the values of the CREA profile into the fields and records the choice in the match log; the same goes for Import from the external databases.
- The values are always intended per 100 g of ingredient. Under the Energy (kcal) field the conversion to kJ (kcal × 4.184) appears automatically.
- If the CREA search finds nothing, the message "No local match. Use the external search (OFF/USDA) below." appears and you can enter the values by hand or, on the Pro plan, use the external search.

Open Food Facts and USDA (Pro only)

- The Ingredient Intelligence box carries the PRO badge. If your plan is not Pro, in its place you see the notice " Open Food Facts / USDA — External search with Ingredient Intelligence" with a Pro button that opens the upgrade.
- The external search queries Open Food Facts and, if the key is configured, USDA FoodData Central. USDA activates only when the API key is present: without a key, the Add USDA link appears next to the title and the search uses Open Food Facts alone.
- Multiple agreeing sources raise the confidence (when a result comes from both Open Food Facts and USDA, the score goes up).
- Every external result shows the sources it comes from (Open Food Facts, USDA or Cache) and the confidence percentage with the High / Medium / Low label; entries that need checking carry the Verify mark.
- The best results of external searches are saved and, on the next search for the same ingredient, offered again with the Cache badge to be faster.
- If nothing is found, "No results. Try a more generic term." appears; in case of a network problem, "Connection error. Try again." appears.

Not-relevant ingredients (flavourings, additives)

- For ingredients that don't affect the values (yeast, flavourings, colourings and the like), press the Not relevant button at the top right of the panel.
- It becomes Not relevant and the message "Ingredient excluded from the nutritional calculation (yeast, flavourings, colourings, etc.)" appears: the numeric fields, the allergens and the CREA search are hidden, and that ingredient no longer weighs on the finished product's calculation.
- To reactivate it, press the same button again.

Nutritional calculation of the finished product

- When the ingredients have their per-100 g values, KoreLab calculates the nutrition declaration of the whole product by itself. You find it in the product's Technical Sheet, Nutritional tab, in the Nutrition Declaration (per 100g) box.
- When the values are calculated from the recipe, the Calculated from recipe badge appears with a green dot * next to each entry; the calculated fields nonetheless remain editable by hand.
- Each ingredient's value is weighted by its share of the batch's net weight (quantity in the recipe relative to the net weight after processing losses), so the result is already expressed per 100 g of product.
- Ingredients marked Not relevant are skipped and don't enter the count.
- Energy (kJ) is derived automatically from kcal (kcal × 4.184).
- If you overwrite the values by hand, the © Use auto button appears to go back to the automatic calculation from the recipe.

Calculation coverage

- If one or more ingredients linked to a raw material have no nutritional values, an orange warning appears indicating how many are missing, with their names, and states "The calculation is partial" showing the coverage percentage.
- Coverage is the share of ingredients (among those tied to a raw material) that have nutritional values. To reach 100%, complete the values of the ingredients listed as missing, or mark them Not relevant if they truly don't matter.
- The warning disappears when the sheet's values have been entered by hand (in that case what you wrote prevails).

Plan notes

- The search in the CREA Database and the Not relevant button are available on all plans.
- The external Ingredient Intelligence search (Open Food Facts + USDA) is reserved for the Pro plan.
- The values you enter stay tied to the raw material: once filled in, they apply to every product that uses that ingredient, with no need to enter them again.

Packaging

The **Packaging** section is where you record all packaging materials (jars, labels, bags, boxes, crates, pallets) with their cost, so that the packaging cost enters the production cost calculation of your products. You reach it from the **Packaging** menu. The screen is organised into FOUR sub-pages, picked with the buttons at the top: **Primary**, **Secondary**, **Cases** and **Tertiary**. The button you choose drives everything: it switches both the **New item** form and the list of items already in the registry below (table view and export included), so you only see the type you care about. Next to each button name is the number of items of that type.

What the four types mean

- Primary packaging: what is in direct contact with the product or contains it individually. Examples: jars, labels, bags.
- Secondary packaging: crates and grouping packaging other than cartons.
- Cases: the cartons that make up the pallets. Every item whose name starts with "cartone" lives here.
- Tertiary: the finished pallet the cartons travel on (this section used to be called "Pallets").

How to (add an item)

- Pick the right sub-page at the top: Primary for jars, labels and bags, Secondary for crates, Cases for cartons, Tertiary for pallets.
- Below the buttons you find the New item form.
- Type the name in the Name field (placeholder "Item name…").
- You can leave the Code field empty: KoreLab assigns the progressive code of the chosen type on its own — PRI_00001 for primary, SEC_00001 for secondary, COL_00001 for cases, TER_00001 for tertiary. A code you type yourself is always kept.
- Choose the unit of measure in the Unit menu: the options are pz, m, cm, g, kg, ml.
- Enter the cost in the Default cost field (numeric field, accepts decimals down to a thousandth, 0.001 step).
- For secondary packaging only, also fill in the Units/pkg field (how many pieces the crate holds; default value 6). Cases have no such field: pieces per carton are set on the individual product (Registry > Products > Cases), because the same carton can hold a different number of pieces depending on the product.
- Press the green Add button (or press Enter from the Name or Default cost fields).

What happens (the cost-per-piece calculation)

- Primary packaging: the cost per piece is the unit price multiplied by the quantity used, that is price × quantity (as the orange box says: "Cost/pc = price × quantity").
- Secondary packaging: the cost per piece is the price of the crate divided by the pieces it contains, that is price ÷ pieces. For secondary items the app shows in real time a €/pz (€ per piece) column calculated automatically as Default cost divided by Units/pkg (the divisor is never lower than 1).
- Cases (cartons): the cost per piece is again carton price ÷ pieces per carton, but the pieces come from the product's case, not from the catalog. In the cost calculation (CPF), the Cases section is read-only: only the default case selected in Registry > Products enters the cost, because several cartons on the same product are alternative selling formats (6-pack or 12-pack), not packaging that adds up.
- Every change is saved automatically: text and numeric fields save when you leave the field (on focus loss), while the Unit menu saves as soon as you pick a value. The list is then re-sorted alphabetically by name.

What happens to product costs (automatic cascade)

- When you save a packaging change, the app recalculates on its own the cost of the products that use that item.
- If one or more products change cost, the notice " N products updated" appears at the bottom; otherwise the save confirmation appears.
- Nothing manual is required: the cascade runs at every packaging save.

Editing or deleting an item

• To change a value, click directly on the row's Name, Unit, Default cost (or Units/pkg for secondary) field and type the new value: the change saves itself.
• To delete an item, press the red button on the row.

Packaging suppliers

Each item can have one or more dedicated suppliers, with price and delivery times. On the item's row a **** button appears followed by a number (how many suppliers are linked): the button is solid (teal) when there is at least one supplier, otherwise hollow with a grey border.

• Click the row's button (the tooltip on hover is "Manage suppliers"): the panel " Suppliers — item name" opens below the row.
• In the — Select supplier — menu choose the supplier. Only suppliers enabled for packaging and not yet linked to that item appear.
• Enter the price in the €/unit field and, if you wish, change the delivery days in the Lead gg field (lead time in days; the field starts with the value 1).
• Tick Default if you want it to be the default supplier.
• Press + Add.

What happens with suppliers

• The default supplier is marked with the Def star (green background); the others have the hollow star . Clicking a row's star switches on the fly which supplier is the default.
• When an item has a default supplier, a " supplier name — price" row appears under the item's name.
• Each linked supplier shows the price followed by its unit (e.g. "0.50/pz") and, only when the delivery days are greater than zero, the "ñ Ngg" indication (N days). To unlink it press the next to it.

Enabling a supplier for packaging (the flag)

In the **— Select supplier —** drop-down only suppliers marked as packaging suppliers appear. If a supplier is missing from the list, go to **Suppliers**, open the supplier and, in the **Supplier type** section, tick the **Packaging** box: only then will it be selectable here. In the supplier list, enabled suppliers show the " Packaging" tag.

Table view, multi-select and archiving

• Above the list there is a search box: type a name, code, EAN, type or unit and the list narrows immediately. You can use several words, even separated or in a different order ("carton 300" finds "Carton 300x200x150"). The clear filtersbutton next to the box brings everything back.
• At the top you find the buttons toswitch from the card view to the TABLE view (all items together, sortable by clicking the headers, with the Typecolumn) and Export viewto download what you are looking at to CSV.
• In the table view every row has a checkbox: selecting one or more items brings up the actions bar — Archive/ Reactivateand Export selection— which always states how many items it is about to act on.
• An item you no longer use gets ARCHIVED (from the button on its row or in bulk): it leaves the operational lists but stays in the history and in the products that use it; Show archived(with the count) brings them back, marked ARCHIVED, so you can reactivate them. An archived item is no longer offered in the product packaging selectors (price calculation) nor in evaluations; products that already use it stay intact and keep showing it.
• Type, unit, units/pkg and cost are NOT bulk-editable: they feed the product cost recalculation, so they change only from the single row.

Plan notes (number of items)

• The number of packaging items is limited by plan: Free up to 5, Starter up to 15, Pro/Quality/Consultant unlimited.
• If you try to add an item beyond the limit, the app doesn't save it, shows the notice " [plan name] plan limit: max N packaging. Upgrade to add more." and takes you straight to the Upgrade screen.

Plan notes (suppliers per item)

• On the Free plan you can link at most 1 supplier to each packaging item. When you try to add a second one, the app shows, in place of the form, the notice " Starter+ plan for more suppliers" with the Upgrade button.
• From the Starter plan up you can link several suppliers per item, useful for comparing prices and delivery times.

• Packaging supplier management (the button and its panel) is available when the suppliers module is on: if it isn't, you only see name, unit, default cost and any units/pkg, without the button.

Tertiary (palletization)

The fourth item type is **Tertiary**: the finished pallet the cartons travel on. You pick it with the **Tertiary** button in the selector at the top (this section used to be called "Pallets").

How to — add a pallet

• Press the Tertiary button in the selector at the top of the page.
• For the most common formats use the Standard presets: buttons — EPAL 800×1200, Industrial 1000×1200, Half pallet 600×800 — which instantly create a row with base, base height, max height and max load already filled in (everything stays editable afterwards).
• Alternatively type a Name, a Default cost and press Add, then fill in the dimensions on the row by hand: L (mm) and W (mm) (the base), Base height (the height of the skid alone), Weight (kg) (empty weight of the pallet), H max (mm) (maximum height of the finished pallet, base included) and Max load (kg) (maximum load weight).

What happens

The pallet's dimensions feed the automatic calculation of the **Pallet logistics sheet** on every product (below): without a base size and max height filled in, that pallet isn't selectable for the calculation.

Pallet logistics sheet (on the product)

Every product, on its **Registry** page (the **Shipping packages** section), can have one or more **packages** (e.g. "Carton" · pieces per package · weight): linking a package to a carton from the Packaging **Cases** sub-page (or entering L×W×H by hand) and choosing a pallet, KoreLab automatically calculates how many cartons fit on a pallet. The same cases feed the product cost (default case from the product registry) and the technical sheet, where the carton type and pieces per carton of every covered product are listed.

How to

• On the product's registry page, Shipping packages section, press + Add package and pick a carton from the menu (the L×W×H dimensions come from the Packaging catalog) or leave Carton: manual dimensions and enter L/W/H by hand; tick Not rotatable if the carton can't be rotated during the calculation.
• Scroll to the Pallet logistics sheet card: for each package with dimensions, choose the pallet from the — Choose pallet — menu, the Interlock pattern (even layers rotated 180°, more stable) or Column (identical layers, cartons better resist compression) and, if needed, the allowed Overhang in mm (protrusion beyond the base, per side).
• If the dimensions are complete and you've chosen a pallet, the calculation appears immediately: Cartons/layer (TI), Layers (HI), Cartons/pallet, Pieces/pallet, Height and Weight of the finished pallet, and Base saturation as a percentage, together with the Odd layer and Even layer (180°) diagrams, the Stacked layers view (side elevation with the total height) and the 3D view in perspective.
• Press Logistics sheet PDF to download the document with all the views, ready to hand to customers and retail chains.

What happens

• The calculation is always live: changing the pattern, overhang or pallet updates the TI/HI and the views immediately, with nothing to save.
• If the carton's dimensions are missing, the panel flags it ("Missing carton dimensions…"); if the carton doesn't fit on the base (not even rotated) or exceeds the max height, the matching warning appears instead of the calculation.
• Only the choices are saved on the package (pallet, pattern, overhang, "not rotatable"): the calculation (TI, HI, height, weight) is never stored, it's always recalculated on the fly.

Plan notes (Tertiary)

Tertiary items have no plan gate of their own: they count toward the plan's general packaging item limit (Free 5, Starter 15, Pro/Quality/Consultant unlimited), together with Primary, Secondary and Cases.

CATALOG

Suppliers

The Suppliers section holds the complete master data of your suppliers (company details, contacts, payment terms and delivery days), lets you rate them with a 4-criteria radar chart and link them to ingredient and packaging prices. You find it in the left menu under **Suppliers**, in the Catalog group.

When you open the section you see the list of the records already created, with the **Suppliers (n)** header showing in brackets how many suppliers you have. Each record is a clickable card with a coloured left border: green if the average rating is high (4 or above), amber if intermediate (2.5 to 4), red if low (below 2.5), grey if you haven't rated it yet.

How to — create a supplier

- Open Suppliers from the menu.
- Press the New supplier button at the top right (if the list is empty, the Add first supplier button appears in the middle).
- Fill in the Company data box: Company name (required, marked with the asterisk), Company name (legal), P.IVA / CF (VAT number / tax code), the address (it is the field labelled Notes at the top of the box), City, Province, Country (default "Italia") and Website.
- Fill in the Contacts box: Contact person, Phone, Email, Payment terms (free-text field, with a hint like "30 days end of month").
- In Delivery days click the days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun): the active ones turn dark blue. Click again to remove a day.
- In Supplier type tick one or both of the Raw Materials and Packaging boxes, depending on what they supply. The Raw Materials box is already ticked by default in a new supplier.
- In the Notes field at the bottom of the Contacts box write any free annotations.
- Press Save at the top right to confirm and go back to the list.

How to — rate a supplier (4-criteria radar)

- Open the supplier's record in edit mode (or stay in it after creating the supplier) down to the Rating box.
- Give each criterion a score from 1 to 5 by clicking the numbered buttons: Quality, Delivery, Price, Support. Above each criterion, on the right, the chosen score appears in the "X/5" format.
- As you rate, the radar chart beside it updates and below it the supplier's Average score appears (the mean of the four criteria, out of 5).
- Press Save to confirm.

How to — edit or delete

- From the list, click a card to open the supplier's detail view.
- Press Edit (dark-blue button) to enter edit mode; you can also use Edit directly on the card without opening it. To delete the supplier use (from the detail view or from the card).
- To exit use < Back from edit mode, or < List from the detail view to return to the list.

What happens

- When you edit an already existing supplier, the changes are saved on their own about one second after you stop typing (autosave): you can still press Save to exit right away.
- For a new supplier (not yet saved) the autosave does not act: you must press Save at least once.
- The colour of the card's border and the "X/5" number in the list derive automatically from the average of the 4 scores: they recalculate on their own at every rating change. The "X/5" number appears only if you have given at least one score.
- The Raw Materials and Packaging boxes decide where the supplier will be selectable: in particular, a supplier appears in the Packaging suppliers list only if its Packaging box is ticked.

How to — link a supplier to an ingredient's price

- Go to the raw materials catalog (Ingredients).
- On the ingredient's row press the button (it shows the number of suppliers already linked): the Suppliers — ingredient name panel opens.

- In the — Select supplier — drop-down choose the supplier (here all suppliers are selectable, not only raw material ones).
- Enter the Cost/unit and select the unit of measure.
- If it is the reference supplier, tick Default.
- Press + Add: the supplier appears in the list with price and unit; the reference one is marked with the DEFAULT label. To remove a link use next to the row.

How to — link a supplier to a packaging item

- Go to the Packaging section.
- On the item's row press the button (with the supplier count): the Suppliers — item name panel opens.
- In the — Select supplier — menu choose the supplier (only those marked as packaging suppliers and not yet linked to that item appear).
- Enter the €/unit and the Lead gg days (lead time), tick Default if it is the main one.
- Press + Add. On the linked supplier's row you can press / Def to set or unset it as default, and to unlink it.

Special cases

- In the packaging panel, only suppliers with the Packaging box ticked appear in the menu, and only those not yet linked to that item. If you can't find a supplier, open its record and enable Packaging.
- In the ingredients panel, instead, the menu doesn't filter by type: you see all the suppliers in the master data, including those marked packaging-only.
- The button becomes solid (coloured) when there are linked suppliers, hollow when there are none: it tells you at a glance where you have already set prices.

Plan notes

- The number of supplier records you can create depends on the plan: the Free plan allows 5, Starter 25, while Pro, Quality and Consultant are unlimited. When you try to go over the limit, a notice like " Plan limit … max N suppliers" appears and invites you to open Suppliers > Upgrade.
- On the Free plan you can link only one supplier to each packaging item: past the limit, the notice " Starter+ plan for more suppliers" with the Upgrade button appears. With a higher plan you can link several suppliers to the same item and compare prices. (For ingredients this per-item limit is not enforced in this module.)
- The ability to link suppliers to ingredients and packaging (the button and panel) depends on the Suppliers module being enabled: if it is off, the sections show only the prices without supplier management.

Customers

The Customers section is your customers' commercial master data, twin of the Suppliers one but already prepared for **e-invoicing**: every record carries the FatturaPA fields (VAT number, tax code, SDI recipient code, PEC, full address). You find it in the menu under **Customers**. The customers recorded here are proposed in Orders, Delivery notes & shipments and Invoices.

What the screen looks like

- At the top, the Customers (n)header with the count, the grid/tableview switch, the Export viewbutton (CSV for Excel of the current view) and New customer.
- The search field filters by name, code, city, VAT number, email and contact person.
- Each card shows name, code, city, the VATand PA(Public Administration) badges and the GDPR status (OK GDPRconsent received, GDPR pendingrequest sent and still unanswered, GDPR — no replythe 3 automatic reminders are used up, GDPR — new requestconsent already received and a new data request sent), plus phone and email.
- If you have archived customers, Show archived (n)appears to include them in the list.

How to: create a customer

- Press New customer.
- In the Contactsbox fill in Name / Business name(required), internal code, contact person, phone, email, payment terms and notes.
- In the Tax data / E-invoicingbox choose the Subject type(Private individual, Sole proprietorship, Company, Public Administration) and fill in legal name, VAT number, Tax code, Recipient code (SdI)(7 characters) and PEC.
- Fill in the Address (registered office): typing the postal codeand leaving the field, town and province fill themselves in (if the code belongs to several towns you are asked which one).
- If the customer is a PA, the IPA office codefield also appears; the Split paymentcheckbox flags split-payment customers (the invoice will take it into account).
- In the Shipping addressbox leave the Same as registered officecheckbox, or untick it and fill in the delivery address: it is the one that will end up on delivery notes.
- Press Save.

How to: fill in the data with the VAT lookup (VIES)

- Type the VAT numberand press Search.
- KoreLab queries VIES (the European VAT archive): if the VAT number is valid, it fills in the legal name and registered office address by itself; if not, it tells you.
- The first 5 lookupsare free (a "remaining" counter under the field); for unlimited lookups there is the VAT lookup · €1/monthadd-on.

How to: edit, archive, delete

- Click the card to open the detail(contacts, tax data, GDPR consent and dossier), or Editto go straight to editing.
- While editing an already saved customer, changes save themselves shortly after you stop typing (auto save); Savecloses immediately.
- The OK Active / Archivedbutton at the top archives the customer: they disappear from new documents' menus but remain in historical documents. Click again to reactivate.
- The deletes the customer.

GDPR consent and dossier

- In the detail, the GDPR box lets you send the customer the self-service privacy consent request(they receive a link and accept online); the status appears as a badge on the card.
- If the recipient does not reply, KoreLab sends up to 3 automatic reminders, at most one every 3 days; once they are used up the badge turns into GDPR — no reply. It is not final: pressing » Resend requestagain restarts the cycle from zero, for up to 3 more reminders.
- On a customer who has already given consentthe same button is how you ask for updated data (new PEC, new SDI code): the

badge becomes GDPR — new requestand in that case no automatic reminder is sent, because consent is already on record.
- The Customer dossierlists the deliveries (shipments) recorded to that customer, with date, lots and DDT number: the historical view of what you delivered to them.

Agent and commission (Business plan)

If you use Agent commissions, the Contacts box also shows the **Agent**and **Commission % (customer override)**fields: they assign the agent to the customer and their specific percentage, which will be proposed on invoices made out to them. The fields appear only with the Business plan and at least one agent recorded.

Table view, multiple selection and bulk edits

The buttons at the top switch from the card view to the **TABLE**view (sortable by clicking the headers); **Export view**downloads exactly the rows you are looking at as CSV.

In the table view every row has a checkbox: selecting one or more customers brings up the action bar, which always states **how many customers**it is about to act on. There are four actions:

- Archive/ Reactivate— they act on the right subset: if the selection mixes active and archived customers, "Archive" only touches the former and "Reactivate" only the latter.
- Agent…— assigns the agent and the commission in bulk. Choosing "clear" removes the agent, and the rate with them: an orphan percentage would never be used by any document.
- Commercial terms…— price list, default discount, payment type, bank, payment terms, credit limit.
- Tax details…— subject type, split payment, country, default invoice note and automatic courtesy copy.

Only the fields you fill in are written: those left empty stay unchanged on each customer. To actually erase a value there is the **"clear"**option, which is an explicit choice — so opening a panel and filling in nothing erases nothing. Every bulk change can be **undone**straight away from the notice that appears, and if some rows fail KoreLab tells you how many: never a silent partial outcome.

The fields that identify the individual customer are never edited in bulk— VAT number, tax code, PEC, recipient code, IBAN, email, name and code — and that is not a technical limitation: writing the same value across several customers would not be a bulk edit but a merging of records, and on a VAT number it would produce invoices made out to the wrong party. The **VIES check**results are also excluded, as they concern one single VAT number. And there is no bulk delete: a customer is referenced by orders, delivery notes, invoices and collections, so you archive them.

Plan notes

- The Customers records are available on all plans (master data group).
- Unlimited VAT lookup requires the VIES add-on (€1/month); the first 5 lookups are free anyway.
- The Agent/Commission fields require the Businessplan (currently in private testing together with the rest of Administration).

Categories

The Categories section is for organizing your products into groups (categories) and sub-groups (subcategories), so you can find, group and filter them faster throughout the app. You find it in the **Categories** menu item (Catalog group); at the top there is always a light-blue info box with the note "Organize your products into categories and subcategories".

What the screen looks like

- At the top, a light-blue box with the informational note about categories.
- Below it, the list of the categories already created: each one is a "card" with a coloured left border. The colour is assigned automatically from a fixed palette of 8 shades, in order; from the ninth category on, the colours start over.
- At the bottom, a card with the New category field and the green Add category button to create new ones.

How to — create a category

- Open the Categories menu item.
- Scroll down to the card at the bottom with the New category field.
- Type the category name in the field.
- Press the green Add category button (or the Enter key on the keyboard).
- The new category appears in the list right away, already open and ready for adding subcategories. The input field clears itself so you can enter another one.

How to — rename a category

- Locate the card of the category to edit.
- Press the pencil button to the right of the name.
- The name becomes an editable field: delete and retype the text.
- Confirm by pressing Enter, or simply by clicking outside the field (saving also happens when the field loses focus).

How to — delete a category

- Locate the category card.
- Press the red button on the right.
- The category disappears from the list immediately, together with all its subcategories. There is no confirmation window, but for about 10 seconds you can undo the operation (see "Undoing a deletion").

How to — open and close a category

- Each card has an arrow on the left: ¼ when it is open, ¶ when it is closed.
- Press the arrow to show or hide the subcategories it contains. Next to the name you always find the "N sub" counter showing how many subcategories are inside.

How to — create a subcategory

- Open the category with the ¼ arrow.
- At the bottom of the subcategory list there is a dashed-border field labelled New subcategory.
- Type the subcategory name.
- Press the button next to the field (or the Enter key).
- The subcategory is added under the category; the field clears so you can enter another one right away.

How to — rename or delete a subcategory

- Open the category that contains it.
- Each subcategory is a row starting with the › symbol.
- To rename it, press the pencil next to the row: the text becomes editable; confirm with Enter or by clicking outside the field.
- To delete it, press the red button next to the row. Here too the deletion is immediate but can be undone for about 10 seconds.

What happens

- Every change (adding, renaming, deleting categories or subcategories) is saved right away: there is no separate "Save" button. On cloud save the app shows the "OK Saved to cloud" message.
- Each category is automatically assigned a colour, used as the card's border to tell them apart at a glance.
- The "N sub" counter updates on its own with every subcategory added or removed.
- Deleting a category also removes all the subcategories it contained.
- When you delete a category, the products that used it are NOT deleted: they remain, but lose the link. Those products get both the category and any subcategory removed (they go back to "No category"), so they don't stay attached to a category that no longer exists. To reclassify them you will need to reassign a category from the product page.

Undoing a deletion

- Right after you delete a category or a subcategory, a dark notice appears at the bottom centre of the screen with the element's name and the word "deleted", a countdown in seconds and the © Undo button.
- Pressing © Undo within the time limit restores the element and the app shows "Deletion undone".
- If you do nothing, when the countdown runs out (about 10 seconds) the deletion becomes final in the cloud as well.

Plan limits

- The number of categories and subcategories you can create depends on your plan. On the Free plan you can have at most 3 categories and 2 subcategories; on the Starter plan at most 5 categories and 5 subcategories; on the Pro, Quality and Consultant plans categories and subcategories are unlimited.
- If you try to add a category beyond your plan's limit, the app doesn't create it: it shows a notice like " Plan limit … max N categories. Upgrade to add more." and takes you straight to the plan upgrade page.
- The same goes for subcategories over the limit: a similar "max N subcategories" notice and redirect to the upgrade page.
- Renaming and deleting are not subject to limits: the check kicks in only when the total increases.

How to use them to organize and filter

- Categories and subcategories are the scaffolding you group products with: by assigning each product its category (and subcategory, if any) you can later find it and group it by product family.
- They are used to sort and filter products and price lists, so you can work on one subset at a time instead of the whole list.
- It's best to define the category structure here before populating your products, so you can classify them correctly from the start.

Special cases

- If you press Add category,   or Enter with the field empty (or containing only spaces), nothing is created: a valid name is required.
- If you leave the rename field without typing anything new and click outside, the text present at that moment is saved.
- A newly created category is born open and without subcategories (counter at 0 sub).
- If you delete something by mistake, you have about 10 seconds to recover it with © Undo before the deletion becomes final.

Product Registry — list memory

Product Registry remembers for 8 hours, in the current session, the search, every active filter, the sorting selected by clicking a column header and the rows selected in table view, together with the vertical position. Remembered filters include: category, product line, producer, archived items, missing data, warehouse and stock condition. If you leave the page and return with the same account, you therefore see the same product set in the same order, with the same ticks and at the vertical point you left. After opening a product card, the browser **Back** and **Forward** buttons move between its detail and that same point in the list; a link to a missing product or one outside the account safely returns to the list instead. The memory is isolated per account on the same browser and neither contains nor changes product data. Press **clear filters** to clear the search and every filter, including **Show missing**, archived items and warehouse, while intentionally preserving sorting and selection. If a filter hides a selected row, bulk actions still work only on selected rows that are visible; its tick returns when the row is shown again. Press **Clear** in the bulk-action bar to explicitly clear the selection. IDs of products that no longer exist are discarded. Table/Card mode continues to be remembered by the view preference. If the session expires or browser storage is unavailable, the page safely starts again with empty filters, default ordering and no selected rows, at the top of the list.

Filters in use appear above the list as **Field: Value** chips: press the on one chip to remove only that criterion, or **clear filters** to remove them all. Removing filters does not change sorting or selected rows.

To leave more room for products, **search** always stays visible and the other criteria open from the **Filters** button. The number on the button counts active criteria inside the panel; when you close it, their chips remain visible and removable. The panel contains category, line, warehouse, producer, archived items and **Show missing**.

Use **Group: category** to split the results into sections ordered by name, each with its own count, in both table and card views. Products not classified yet appear under **No category**. Grouping neither changes nor duplicates products and is remembered for 8 hours like sorting; **clear filters** preserves it, while **Group: none** returns to one continuous list.

To keep a combination beyond 8 hours, open **Views**, enter a name and press **Save view**. A personal view includes the current search and filters, sorting, grouping and Table/Card mode; it neither contains nor changes product data. The view appears in the local copy immediately, then the status next to the controls distinguishes **waiting**, **saving**, **saved to your cloud profile** or **not saved to the cloud**. On error, the local copy remains on that device and you can press **Retry**: only cloud confirmation proves the view will follow your account after a reload or on another device. Press its name to recall it. Saving the same name again updates that view; the trash button deletes only the named view and leaves products and current filters unchanged. You can keep up to **20 personal views**: at the limit, KoreLab never deletes one automatically and asks you to remove one or update an existing name. Views are personal and are not shared with the team.

When you select one or more visible rows, the search area becomes the **selection bar**: it shows the exact number of products that will be affected, together with Archive/Reactivate, **Category** and **Registry fields**. Search, filters, grouping and views are not cleared: they are temporarily collapsed and return unchanged with **Clear**. Open **More actions** for less frequent commands, grouped under **Registry**, **Logistics**, **CPF impact** and **Export**; allowlists, CPF warnings, plan limits and undo stay unchanged.

Product Registry (bulk actions)

The **Product Registry**section (menu **Products**, Catalog group — not to be confused with the **Products**page under Commercial, where you manage CPF and prices: they are two views on the same product) holds the identification, traceability and invoicing data of every product — category, unit of measure, VAT code, weights, customs data, producer, packages and pallet logistics sheet — and lets you edit them **in bulk**across several products at once. **Products are created here**: press **New product**at the top, enter name and code (proposed from the name, editable only before the first save) and save. After saving, the **Create the CPF**button appears — **Open CPF**for products that already have one —: it opens the cost sheet of the **same**product (same `id`, no migration) on the Commercial Products page. **Duplicate**and **Create product from bill of materials**(from Recipes) also start here: they open a new pre-filled Registry entry to confirm before generating the CPF; the Commercial Products page no longer creates new products, only opens existing ones.

Warning icons on the cards

In the card view, every product shows icons for the data still missing, with an explanation on hover: **VAT**(missing both rate and exemption reason), **weight**(net and/or gross), **lot**and **expiry**(flagged separately: they get set at different times, and an explicit "No" is NOT a missing value), **cases**and **pallet sheet**. The cases and pallet icons **do not appear on products published to forkintravel**: cases and pallets concern goods moved wholesale, not single-piece shipments. A **legend**with the meaning of each icon is always shown above the cards.

Cases: what is inherited from the carton and the pallet

In the **Cases / outbound packaging**box, the carton menu offers **only packaging of type Cases**(the shipping cartons that make up the pallet): sleeves and wraps, which wrap the single product, are not cases and do not appear. When you pick a carton, its **L×W×H dimensions are inherited automatically**: the three fields stay empty and show the carton's measurement in grey — fill them in only if that specific case measures differently. The same goes for the pallet in the **Pallet logistics sheet**: deck dimensions, pallet height, maximum height and weight come from the pallet's registry entry and feed the TI-HI calculation. The inherited dimensions also appear in the product's **Technical Sheet**, Packaging section, and in its PDF. The case's **net and gross weight**are automatic too: computed from the unit weight (Identity/Traceability section) times the pieces, plus the carton's tare for the gross weight; while that data is missing, a **manual gross weight**field stays available as a fallback, flagged as such. The same applies to the pallet: net and gross pallet weight come from the configuration, and the finished height includes the EPAL deck height.

The default case: the sole source of the carton cost in the CPF

If a product has more than one case configured (e.g. a 6-pack and a 12-pack), only **one**feeds the CPF: the one with the **Default for CPF**tick next to the row (enabled only once a carton is linked). Ticking one automatically clears any other: it is **exactly one**default per product, never the sum of several cases. **No default case means no carton cost**in the CPF, even if legacy carton rows still exist in packaging: the CPF's «Cases» section is read-only and shows only the case chosen here. Changing, replacing or clearing the default recomputes the CPF right away and, if the cost moves, the product is flagged under **Prices changed**on the dashboard.

Multiple pallets for the same case

A case can have **several pallet configurations**: the **Add pallet**button opens a new one (numbered "Pallet 1", "Pallet 2"…), each with its own stacking pattern, overhang and EPAL, each computing TI/HI and weights independently. Existing configurations stay intact when you add more.

Finding products to complete

Above the list, the **Show missing:**row offers five exclusion filters — **Unit of measure**, **Gross weight**, **Country of origin**, **VAT code**, **forkintravel publishing**— that show only the products missing that data (selecting more than one combines them with AND: missing ALL the chosen ones); the **reset**button clears them. In the filter bar, the **Warehouse**filter shows only lot-managed products, only non-lot-managed ones, or all of them — useful for working separately on the warehouse catalog and the sale-only catalog. The search field at the top also searches by unit of measure, besides name, code, EAN and category. The Table view also shows the **Producer**column.

How to: select and apply a bulk action

- In the table view, tick the checkbox on one or more rows (use the Show missingfilters to pre-select candidates, then select from the filtered list).
- The blue N selectedbar appears with the available action buttons.
- Choose the action: some apply immediately (Archive/ Reactivate, publish/unpublish from forkintravel, Assign/move warehouse…), others open a panel to fill in (Category…, Master fields…) or show a warningto read before proceeding (Copy packages / pallet… , Unit weight… , Bill of materials…).
- Every button always states how many products it is about to act on (e.g. "Apply to 12"). When done, you get a confirmation, even a partial one if some rows fail.

Fields that do NOT affect costs or prices (safe in bulk)

- Archive/ Reactivate— removes or brings back the selected products from the operational lists, without deleting them.
- Category…— assigns a category and, if chosen, a subcategory to all selected products.
- Master fields…— a single panel to bulk-fill Unit of measure, VAT code(from the catalog, with a Clear VAT (none)entry to empty it), Gross weight (kg), Customs code, Producer, Country of origin, Lot managementand Expiry date: only the fields you fill in are written, those left empty stay unchanged on every product. The button shows "Apply N field(s) to M products".
- Publish to forkintravel/ Unpublish from forkintravel— appear only when the forkintravel integration is active; publishing respects the plan's publishable-products limit — if you exceed it, the button shows in brackets how many you can still publish and an amber notice explains how many are left out.
- Assign/move warehouse…(Business plan, with at least two active warehouses) — assigns the operational warehouse to the selected items and transfers their existing quantities to the new location; it also works on items at zero stock, which move to the new warehouse from that point on. Does not affect costs or prices.

Fields with a warning (recompute the CPF or overwrite data — read before applying)

- Unit weight…— changes the net weight per piece on all selected products: pieces per batch and therefore the cost per piece (CPF) are recomputedon each one. Use only on products that truly weigh the same.
- Bill of materials…— links the same bill of materials to all selected products (or unlinks it with — None (unlink) —): each product's ingredients and cost (CPF) are recomputed on the new bill.
- Copy packages / pallet…— pick a model product (only products with at least one configured package appear in the list, sorted A>Zand searchable by name/alias/code) and overwritethe packages and pallet logistics sheet of all selected products with the model's, including the default CPF case: the current packages are replaced. Does not affect costs or prices, but the CPF recomputes if the default changes.

Undoing a bulk action

Every bulk action (including the ones with a warning) is **undoable**: right after, a notice appears at the bottom with the **Undo**button, for about 10 seconds. Pressing it restores each product to exactly the value it had before — not a single value for everyone, but each product's own, row by row. If you do nothing, the change becomes final when the time runs out.

Plan notes

Product Registry is available on every plan (master-data group); publishing to forkintravel requires the forkintravel module active on the plan and respects its publishable-products limit.

CATALOG

CUN code (monitored products)

The **CUN** code is a requirement set by Italian Revenue Agency ruling (Provvedimento) no. 93628 of 2026: anyone selling products covered by a **National Single Commission** must state the product's identification code, line by line, on every invoice that sells it. In KoreLab you fill it in once, on the product, and from there it comes out on its own on every invoice line that uses it.

What CUN is, and who it applies to

National Single Commissions periodically set the reference price for certain agri-food supply chains — today **eggs**, the **pork** chain, **rabbits**, **durum wheat**. The ruling requires every invoice selling one of these products to state the identification code published in the list kept by Italy's **Ministry of Agriculture, Food Sovereignty and Forestry (MASAF)**. It only applies to sellers of these products: if you don't sell them, the field stays empty and nothing changes for you.

Where to fill it in

The **CUN code (monitored products)** field sits on the product's card, in **Product Registry**, right after the customs/Intrastat data and the CPA service code.

- Open Products > Product Registry and open (or create) the relevant product's card.
- Scroll to the CUN code (monitored products) field.
- Enter the code exactly as it appears in the list published by MASAF for that product (for example `SU001` for a code in the pork chain).
- Press Save.

What happens on the invoice

From then on, every invoice line that sells this product automatically carries the block the ruling requires — you don't need to fill it in line by line or remember it when issuing the invoice. The code comes out together with the line's other management data (after any EU intent and agricultural data present on that line): it doesn't change the order of information you may already rely on.

KoreLab does not guess it — and does not stop you from invoicing

The list of monitored products is published by MASAF and **changes over time**: KoreLab does not infer it from the product's name or category, because that would be a promise with no engine behind it — a product could enter or leave the list without the software noticing. You, who sell that product, are the one with the list in front of you.

The ruling sets the requirement but **does not provide for rejection**: leaving the field empty does not stop you from invoicing. If you sell monitored products, fill in the code as soon as you know it — even if you've already issued some invoices without it: from that point on, later lines will carry it.

Plan notes

The field itself has no requirements of its own: it follows the conditions of **Product Registry**. The code appears on the invoice only when you generate the FatturaPA XML, a **Business** plan feature (see Administration > Invoices).

Unique Codes

Unique codes are the identifiers KoreLab uses to recognize every element (products, raw materials, packaging, suppliers) unambiguously within your account, in support of traceability and of integrations with other systems. There is no dedicated "Codes" page: the code is born together with the record, in the section where you create it. Note: the behaviour differs between products (an alphanumeric code derived from the name, always present), raw materials (a numeric code with the **MAT**_prefix, always generated automatically, even by hand), packaging (its own per-type sequence) and suppliers (a numeric code only when imported from a file).

What they are for

- Uniquely identifying products, raw materials, packaging and suppliers, even when they have similar names.
- Linking data together (a product references its raw materials, a raw material references its suppliers) without confusion.
- Guaranteeing upstream and downstream traceability, a basic requirement for HACCP self-monitoring and for certifications.

The product code — alphanumeric, generated from the name

Every product has an alphanumeric code that KoreLab proposes starting from the name (for example "Pesto DOP 250g" becomes something like PesDOP250). You see it in the **Product Code** field, next to the name, when you create or edit the product. Until the first save you can change it; after that it becomes fixed.

- Create a new product and type the name in the Product name field.
- Watch the Product Code field: KoreLab fills it in automatically as you type the name. Under the field you find the note "Generated automatically from the name. Editable before saving."
- If the proposed code doesn't convince you, type it directly into the Product Code field (spaces are removed, maximum 20 characters): from that moment the field stops following the name and stays as you wrote it.
- Press Save.

What happens

- At the first save the product code locks: the Not editable wording appears next to the label and the field becomes read-only. From that moment it no longer changes, even if you later rename the product.
- This serves to avoid breaking traceability: documents, sheets and references already issued keep pointing to the same code.
- For this reason it pays to choose name and code carefully before the first save.
- If you try to save a product with a code already used by another product in your account, KoreLab blocks the save with the Code already in use message.

Codes for raw materials, packaging and suppliers

For raw materials, packaging and suppliers the behaviour depends on the entry type and on how you create it. **Raw materials**always receive an automatic code with the **MAT**_prefix (`MAT_00001`, `MAT_00002`…) — whether you create them by hand from their section, on the fly from the Quality modules, or import them from a file — unless you type your own code in the field. **Packaging**has its own sequence per type (see below). **Suppliers**created by hand receive only an internal, non-numbered identifier: a progressive numeric code appears only if you import them from a file.

- Go to the Raw Materials section (or Packaging or Suppliers, depending on what you are entering).
- In the New raw material block fill in the Name field (and, if you wish, the label designation in the field with the "Label name…" placeholder, the Producer, the Origin, the Unit and the Default cost).
- Press Add (or Enter in the name field).

What happens

- Raw materials: every entry immediately receives a MAT_00001, MAT_00002…code, generated automatically even by hand — no import needed. Historical entries left without a code have been regularized once with the same format, without touching codes already present or typed by hand.

- Supplierscreated by hand: KoreLab assigns an internal unique identifier, which you don't type and normally don't see in the list; the entry remains uniquely addressable from every other part of the program (for example when you link a supplier to a raw material). A progressive numeric code appears only if you import the suppliers from a file.
- Packaginghas its own dedicated sequence: from the Cases session, every packaging item always receives an automatic code tied to its type — PRI_00001(primary), SEC_00001(secondary), COL_00001(cases), TER_00001(tertiary) — whether created by hand or imported from a file, unless you type your own code. Each type has its own independent sequence.
- In the Quality modules (for example when you create a raw material or a supplier on the fly from the Warehouse), a Code field marked "optional" is provided: there you can type a code of your own, or leave it empty.
- Don't confuse these internal codes with the Supplier code: a separate field, on the raw material and packaging sheet, where you write the code the supplieruses to identify that item in their own catalog. It is a reference/print field only and does not affect KoreLab's codes.

Codes during file import

When you import raw materials, packaging or suppliers from the Import / Export section, KoreLab automatically assigns a progressive numeric code to each new entry.

- In Import / Export download the template, fill in the data and select the file.
- Confirm the import.
- The new entries receive codes in the 00001, 00002… format, continuing from the highest number already present for that record type.

What happens

- The numbering is separate per type: raw materials, packaging and suppliers each have their own independent sequence.
- Entries with the same name as an existing one are skipped (not duplicated), and you get a notice with how many were skipped.

Uniqueness per account

Codes and identifiers live inside your account: each account has its own numbering, separate from that of other users. For products in particular, KoreLab checks that the product code is not already used by another of your products and, if it is, blocks the save with the **Code already in use** message.

Special cases

- For products, the right moment to settle name and code is before the first save: afterwards, the Product Code is fixed and read-only.
- If you change the name of an already saved raw material, packaging item or supplier, its internal identifier doesn't change.
- The plain numeric codes 00001, 00002… (with no prefix) only exist for suppliers imported from a file; raw materials always carry the MAT_prefix and packaging its own per-type prefix, whether created by hand or imported.
- During an import, the progressive number restarts from the highest existing value plus one: if you deleted the last entry in the sequence, a later import may reuse that number.

Why it matters for traceability

- Having stable, unique identifiers is the basis for proving the traceability of batches, ingredients and suppliers in case of an inspection or a recall.
- The product code, in particular, doesn't change after the first save: references already issued remain consistent and verifiable over time.

Deleting a registry entry (and replacing it)

When you try to delete a registry entry — a packaging item, a raw material, a supplier, a customer or a product — KoreLab first checks whether anything is using it. If it is in use, instead of deleting it a window opens telling you where, and offering to **replace** it with another entry of the same kind.

The underlying rule is simple: **only what has never been used can be deleted**. Everything else is archived, so it leaves the operational lists but stays readable on documents already saved.

Why this window exists

Deleting an item still attached to your products leaves broken references: those products still exist, but the cost of that line becomes zero and the selling price derived from it is wrong — with nothing to flag it. The window prevents that and, when you really do need to get rid of that entry, it lets you move the references first.

How to — replace, then delete

- Press the delete button on the entry's row.
- If the entry is in use, the Entry in use: it cannot be deleted window opens, listing where it appears and how many times (for example: 14 in cost calculation (CPF), 3 in product cases / palletisation, 1 in packaging supplier price lists).
- In the Replace with… menu pick the entry that should take its place. The menu offers only entries of the same kind that are not archived; for packaging it also stays within the same family (a case is replaced by a case, a pallet by a pallet).
- Press Replace.
- The window shows the summary: how many products, bills of materials and price list rows were updated, and how many products changed cost.
- At this point, if the entry is no longer used anywhere, the Delete permanently button appears. Otherwise only Archive stays available, together with the list of where it is still present.

What gets moved and what does not

- Moved: the references that take part in today's calculations — the products' packaging lines and cases, the ingredients of bills of materials and products, the supplier price list rows.
- Left untouched: documents already issued — lots, stock movements, orders, delivery notes and invoices. They are facts that already happened, and rewriting them would falsify traceability. That is why, if the entry appears there, deletion stays blocked even after the replacement: the correct route is to archive it.

What happens to costs

- After the replacement the costs of the affected products are recalculated immediately, and the products that change appear in the dashboard's Price changes card, with the reason "entry replaced" and the name of the new entry. From there you can accept the new prices or keep the old ones, as with any other cascade change.
- If a specific supplier had been chosen on the line, that choice is kept only if the same supplier also has a price list for the new entry; otherwise the line goes back to the catalog cost.
- If the target entry was already present in the same place, after the replacement there will be two rows. The cost total is correct, but the window tells you, because it is worth merging them by hand.

Special cases

- Products and customers: the window shows where they are used and lets you archive them, but does not offer a replacement (replacing a product inside a sales price list, or a customer inside a delivery, would make no sense).
- Usages that cannot be verified: if a source cannot be consulted at that moment — for instance the warehouse has not been opened yet in this session — the window says so and blocks deletion anyway. It is a safety choice: better one archive too many than a deletion that leaves orphaned documents.
- Deleting several entries at once: if you remove several rows in one go and more than one turns out to be in use, a summary notice

appears instead of the window. To be able to choose a replacement, delete them one at a time.

- No candidate: if there is no other entry of the same kind to move the references to, archiving is the only option.

Bills of materials

The Recipes module (under Production > Bills of materials) is where you create the base formulations of your products: ingredients, process yield (weight loss), and the batch and expiry of the finished product. In the interface the term used is always "bill of materials": it is the recipe that KoreLab normalizes to 1 Kg and that then feeds the costs in Production.

Where to find it

- Open the Production menu and select Bills of materials.
- At the top you see the Productioneyebrow, the title Bills of materialswith the total count in brackets, and a subtitle describing the module.
- Below is the filter bar (search, Type, Status, Sort).
- The New bill of materialsbutton at the top right opens the editor. The same button appears in the empty state as Create first bill of materials.

How to: create a bill of materials

- Press New bill of materials: the editor opens with the heading New bill of materials.
- Fill in Bill of materials name *(required field, e.g. "Pesto DOP Basilico"). As you type the name, the Bill of materials codeis generated automatically: the note under the field says "Generated from the name. Editable before saving." You can overwrite it manually (spaces are removed and it is trimmed to a maximum of 20 characters).
- In the Ingredientspanel enter the ingredients the recipe needs. For each row choose the raw material from the selector (the — Manual —option lets you type a non-catalog ingredient in the Ingredient namefield and its cost in €/unit), then enter the Quantity (Kg).
- Use Ingredient(green button) to add more rows; the red at the end of the row deletes the row.
- At the top right of the ingredients panel you see the Totalin Kg: if it is not exactly 1 Kg, the warning " Will be normalized to 1 Kg on confirmation" appears.
- In the Estimated Weight Losspanel set Weight loss %: next to it KoreLab shows the yield in real time, e.g. "Batch 10.00 Kg > yield … net Kg". This value is the single source of the yield: it drives the CPF of every linked size (where the Weight loss field shows as locked), the technical data sheet and the loss proposed in Production. It is edited here only.
- In the Finished product batch and expirypanel tick, if needed, "The finished product has a batch number" and "The finished product has an expiry date". Enabling the expiry brings up Duration, Unit(days / months / years) and, for months only, the "end of month" option. Below you find the formula applied: "Expiry = production date + … ".
- In the Production Notespanel write instructions, temperatures, times, processing steps and the equipment needed.

How to: enter ingredients manually

- If the Raw Materials module is on, the row selector lists the catalog raw materials (sorted by name); choosing — Manual —brings up the Ingredient nameand €/unitfields for an off-catalog ingredient.
- If the Raw Materials module is off, every ingredient is entered by hand only, with Ingredient nameand €/unit.
- When the Raw Materials module is on, the • New Raw Materialbutton opens Raw Materials in context: you create the raw material on the fly and return to the bill of materials with the < Listbutton without losing the draft in progress.

Save Draft and Update bill of materials

- While the bill of materials is a draft, the save button is called Save Draft(at the top and at the bottom of the editor): it saves without normalizing, so you can come back and edit it whenever you want. It stays in the " Draft" status.
- When the bill of materials is already confirmed, the same button becomes Update bill of materialsat the top and Updateat the bottom: it saves changes to an already confirmed bill of materials.
- The Duplicate and Savebutton immediately creates a copy in draft status with the name followed by " (Copy)".

How to: confirm the bill of materials

- In the editor of a draft bill of materials press Confirm bill of materials(at the top) or Confirm and Create Product >(at the bottom). From the list you can use the > Create Productbutton on the card.

• On confirmation, if the ingredient total is not 1 Kg, KoreLab automatically normalizes all quantities to 1 Kg. The "9 Automatic normalization" info box explains it with an example: if you have 2.5 Kg in total, each ingredient is divided by 2.5.

What happens on confirmation

• The bill of materials moves to the " Confirmed" status (green badge in the list).
• Quantities are normalized to 1 Kg, so the product can use the batch multiplier.
• The bill of materials becomes usable in Production and costs are recalculated in cascade on the linked products.
• After confirmation, KoreLab can automatically create the linked product (see below).

How to: create the product from the bill of materials

• At the bottom of a draft's editor, Confirm and Create Product >confirms and immediately starts creating the product.
• From the list, on bills of materials that are not semi-finished and not yet confirmed, the > Create Productbutton does the same thing: it confirms and creates the product.

What happens: the generated product

• The product is created with its ingredients already normalized to 1 Kg.
• From there, in Production you apply the batch multiplier, packaging costs and the price; the ingredients stay linked to the bill of materials.

Semi-finished products (SL) and multi-level SL

• In the editor, in the Name/Code panel, the Semi-finished (SL)checkbox marks the bill of materials as an intermediate production: it does not appear in the product selector and can be used as a semi-finished component inside other bills of materials. When enabled, the generated code ends with "Sem" instead of "Rct".
• The Semi-finished (SL)checkbox is available from the Starter and Pro plans. On plans that do not include it, it appears locked (" Semi-finished (SL) — available from the Starter plan") with the Upgradebutton.
• To insert a semi-finished product inside another bill of materials use Semi-finished SLin the ingredients panel (available on the Pro plan). A green row appears with the Semi-finishedselector and the Output used (kg)field: choose which SL to use and how many Kg of its output go into the recipe.
• Below the selector KoreLab shows the semi-finished product's weight loss and the output per 1 kg of input, e.g. "Weight loss: …% · output per 1kg input: … kg". This way you can nest semi-finished products across several levels (multi-level SL).

Versions and Journal Test (Pro plan)

• For bills of materials already saved, on the Pro plan the editor shows the Bill of materials, Versionsand Testsub-tabs (the latter two with the count in brackets).
• In Versionsyou find the history: every save creates a version (entries marked "Auto-save" are automatic). The Save Version Nowbutton creates a manual one. With © Restoreyou bring the bill of materials back to a previous version (ingredients, labor, yields). The deletes a version (with the confirmation "Delete this version? This cannot be undone."). When there are at least two versions, Compare Versionsappears: choose Version Aand Version Band see the differences in CPF, batch and weight loss plus the "Ingredient Differences" list (added, removed, changed with the quantity transition ">").
• In the Journal Testyou record every trial session. With New Testyou open the form with: Date, Operator, Test objective, What was changed, Result, Issues found, Actual yield (Kg), Additional notesand the score ratings Overall Rating, Texture, Tasteand Color(from 1 to 10). You save with Save. It is there to track how the bill of materials evolves over time.

Special cases: version from production

• If in production a product's quantities were changed compared to the bill of materials, the " Version from production" banner appears at the top of the editor with the number of modified ingredients.
• Accept > definitive bill of materialsadopts the production quantities as the new official bill of materials; Keep as version onlyleaves the bill of materials unchanged and keeps the production one in the history only, hiding the banner.
• In the ingredients panel a green dot marks the matching rows, a red dot (with a red background on the row) the rows whose quantity differs from the version from production; hovering with the mouse shows the comparison "Production: … kg > Recipe: … kg".

List, filters and bulk actions

- The filter bar offers the "Search bill of materials…" search (it searches by name, code and ingredients), the Typefilter (All / Bills of materials / SL, the latter Pro only), the Statusfilter (All / Draft / Confirmed) and the Sortordering (Newest first / Name A>Z / Name Z>A).
- Below the filters, a summary row shows the number of matching bills of materials and, when needed, the page indicator (e.g. "page 1/2").
- Each card shows name, code, category, number of ingredients, total Kg, batch and weight loss, the status badge (SL, Confirmed or Draft) and the Editand > Create Productbuttons (the latter only for bills of materials that are not semi-finished and not yet confirmed), the note button and the deletion (with the confirmation "Delete this bill of materials?"). Clicking the card opens the editor directly.
- When the results exceed one page, the pagination controls appear («« ‹ … › »»).
- On the Pro plan, if you have defined tags (in Settings), the Tagfilter and multi-selection appear: with Select allyou pick several bills of materials and then assign or remove tags in bulk. On non-Pro plans, instead of the tag filter you see " Tag filters available with the PRO plan" and an Upgradebutton.

Plan notes

- Bills of materials are available on all plans. The plan only determines how many: the Free plan allows up to 5, the others are unlimited. When the limit is exceeded, a warning with an upgrade prompt appears on save.
- Semi-finished products (SL) require at least the Starter plan; the advanced features Versions, Journal Test, semi-finished products in the ingredients panel, tags and tag filters require the Pro plan. Wherever a feature is locked you find a notice and an Upgradebutton.

Linked product sizes (the chain seen from the bill of materials)

- In the editor of a non-semi-finished bill of materials, the Linked product sizespanel lists the finished products packed from THIS bill of materials' dough (e.g. one bill of materials for the 120g, 160g and 500g tray formats), with the weight per pack.
- The New sizebutton creates a new product linked to the bill of materials (the CPF opens pre-filled): it is the quickest way to add a format.
- Producing the batch of a bill of materials with linked sizes creates the doughlot; each size is packed from it (Production page > Packing).

Production insertion order

- The small square to the left of each ingredient row numbers the production insertion order: click in sequence (1, 2, 3…) and click again to remove the number.
- Numbered ingredients appear first, in the chosen order, in the Production page table; unnumbered ones follow, sorted by quantity. It does not change the order in the technical sheet.

Production

The Production module is used to record an actual production run (or a production test) starting from an already confirmed bill of materials: you set the quantity to produce, check the ingredient weights, record any deviations from the bill of materials and save everything with a batch number, date and expiry. You find it in the main menu under **Production**(page title **Product Production**, with the subtitle "Select a recipe and set the quantity to produce.").

How to

- Open Productionfrom the menu. To go back, use the button at the top left (< Back).
- In the Bill of materialsfield choose what to produce. The list shows only confirmed bills of materials, each marked with a ; if you have not selected anything yet you see the — Select recipe —placeholder and the central screen (Select a product· "Select a recipe to view the ingredients.") invites you to choose a bill of materials first.
- Set the quantity in one of two alternative ways: type the kilograms in the Quantity to produce (kg)field, or enter the number of pieces in the Target unitsfield. The two fields are alternatives, separated by the word or: as soon as you fill in one, the other is calculated automatically and shown read-only with the < calculatedlabel (teal text on a light green background).
- Enter the Package weight (kg)(e.g. 0.250). Under the field is the note Used for unit calculation — not saved. It is used to estimate the units when you start from kg and to calculate the gross kg needed when you start from the number of units.
- Once you have set kg or units, a ×button (titled Reset calculation) appears next to the fields: it clears only the calculation mode (kg and units). To clear the whole row (bill of materials, kg, units, weight) use the º Resetbutton instead, which appears as soon as any of these fields has a value.
- In the panel with the amber left border check the Batch No.: it is mandatory(without it the production cannot be saved) and it is suggested automaticallyfrom the format configured in Settings > Production & Warehouse — you can always edit it. Next to it, the Production date(preset to today).
- Check the Expiry (TMC): if the bill of materials has a shelf life, the date is pre-filled and flagged with < from bill of materials; you can still change it manually.
- In the ingredients table check the weights and, for each ingredient actually added to the mix, tick the column; if the real quantity differs, type it in the Actual qty (kg)column and add a Noteif needed.
- If you manage the warehouse, in the Raw-material lots to consumepanel leave the automatic consumption or force a specific lot for each raw material.
- Write any observations in the Production notesfield.
- Press Save Production. While saving, the button shows ćSaving…and when done a confirmation message appears.

The ingredients table

- The bill of materials is normalized to 1 kg and the weights shown are calculated on the quantity you set, applying the bill of materials' process loss (weight loss). At the top of the panel you see three numbers: Gross batch(kg of mix), Net yieldwith the deducted loss percentage next to it (e.g. "Net yield (-5%)"), and Units(the estimated packages).
- The columns are: Ingredient, % Recipe, Recipe qty (kg)(the planned quantity), the column (the ingredient has been added to the mix), Actual qty (kg)and Note.
- Semi-finished products are highlighted in green with the SLlabel and, if they have a loss, the wording "loss …%". Below the semi-finished product its raw materials appear indented (with the > symbol): these too have their own checkbox, actual quantity and note. For indented rows the % Recipecolumn shows a dash.
- When you tick the checkbox, the Actual qty (kg)field becomes active and is pre-filled with the recipe quantity; until you tick it, the field stays disabled.
- If the actual quantity you type deviates from the recipe quantity (by more than 0.001 kg), the row turns yellow and the field is highlighted in yellow with a border: it is a deviation recorded as a change.

What happens on save

- The production run is saved with: the bill of materials and its name, Batch No., date, kg of mix (target and actual), estimated number of units and package weight, expiry, the list of ingredients (with recipe quantity, actual quantity, notes, checkbox and change flag, and for semi-finished products the sub-rows too) and the Production notes. The production status is "completed".
- If you changed the actual quantity of one or more ingredients, the software automatically creates a new version of the bill of

materials labeled "version from production": the actual quantities are recalculated and normalized (so the sum adds back up to 1 kg) and the production run stays linked to that version.
- If you changed the raw materials of a semi-finished product, a version of the semi-finished product is also created ("version from production (semi-finished)"), one for each semi-finished product touched.
- The final message summarizes what was created: " Production saved" and, if generated, "recipe version created" and the count of "semi-finished version(s)".

Managing bill of materials versions

- You do not have to create versions by hand: they are generated automatically only when you record an actual deviation (tick + actual quantity different from the recipe quantity). This way the production run captures exactly how you produced that batch.
- The "from production" versions keep track of how the mix was actually made that day, without modifying the original confirmed bill of materials.

Raw-material lots (warehouse)

- The Raw-material lots to consumepanel appears only if the bill of materials uses raw materials and if the warehouse has lots with stock.
- Consumption follows FEFOlogic by default (closest expiry first): for each raw material the right lot is proposed automatically. The first menu entry looks like "Automatic FEFO > (lot code) · exp. (date)".
- You can manually force a specific lot by choosing it from the dropdown, which shows supplier lot code, supplier, stock and expiry. Leaving the Automatic FEFOentry keeps the automatic choice.
- If a raw material has no stock, the warning " no lot in the warehouse for this raw material" appears.

Special cases

- Calculation mode: if you start from kg, the number of units is estimated (it requires the package weight); if you start from units, the gross kg needed are calculated taking the loss into account. When you switch fields, the system automatically manages which of the two is "calculated".
- Expiry: if the bill of materials has no expiry, the field stays empty with the note "No expiry in the bill of materials · type it manually if needed"; if it does, under the field you see "Calculated: prod. date + value unit" (possibly with "(end of month)") and any manual change is flagged with "· changed manually".
- Bill of materials production notes: if the bill of materials has predefined production notes, they are shown in the light blue Production notespanel as a reminder, separate from the free-text Production notesfield.

Plan notes

- On the Free plan, inside the yellow note under the table you see the notice " HACCP quality sheet available from Starter": recording the production works, but the linked HACCP quality sheet is available starting from the Starter plan.

The cascading production chain: finished product > bill of materials > semi-finished

KoreLab models production as a three-level cascade, each with its own LOTS in the warehouse:

- Semi-finished (SL): produced first, possibly on different days, by selecting their SL bill of materials on this page. Each run creates a semi-finished lot stocked in the warehouse.
- Bill of materials (dough): producing a product's bill of materials, the batch consumes the semi-finished LOTS(no longer their raw materials): in the Semi-finished lots to consumepanel the latest lotof each SL is proposed and you can pick another from the menu. If the bill of materials has linked sizes, the batch creates the doughlot (name followed by «— impasto», in gross kg) — not yet sellable: a notice on the page reminds you.
- Packing (finished product): from the Packingmode you choose the size, and the system consumes the dough of its bill of materials— the same one for all sizes (120g, 160g, tray…).

If a semi-finished has no lots in stock (or not enough), the batch **is blocked**: the requirement shown is **gross of the semi-finished loss**(SL lots are recorded at gross batch weight, so they run out without ghost residues) and the save button stays disabled until the lots cover it — produce the missing semi-finished first. For **raw materials**, which may legitimately not be lot-tracked, saving asks for an explicit confirmation instead and records a tracked partial consumption.

Packing

- At the top of the Production page you find the Production (SL and recipes) | Packingselector (it appears if at least one product has a linked bill of materials and the Warehouse module is enabled). Switch to Packingwhen you pack.
- Choose the Product to pack(the size) and enter the number of Packs. The Weight per pack (kg)comes from the «Unit weight» in the Registry (if missing, set it there); the Weight loss (%)is prefilled from the bill of materials(the same source the CPF uses) and you can adjust it for the single lot, since a batch's real yield may differ from the theoretical one: if the value you type differs from the one on the bill of materials, a warning appears.
- The Dough lotrows automatically propose the lots to consume (the latest one producedfirst) with the kg per row: you can change lot, adjust the kg, add rows with Add lotto consume from several lots at once, or go back to the proposal with º Re-propose automatic. Saving stays blocked until the rows cover the gross dough required.
- The preview shows: Finished product (net)(packs × weight), the Gross doughto consume (net ÷ (1 - loss%)) and the Dough available, plus — for each Primary packagingof the product sheet — the pieces needed and available.
- Fill in the Lot no.(mandatory, suggested from the format in Settings like the batch), Packing dateand Expiry (BBD)(prefilled from the recipe shelf life, editable) and press Save packing.

On save, KoreLab consumes the dough (gross of the weight loss, from the lots chosen in the rows) and the primary packaging, and loads the packed lot in **net kg**. Dough coverage is mandatory (without it, saving stays blocked); for packaging, if stock is not enough what is available is consumed and the shortfall is reported. Traceability and the mock recall run through the WHOLE chain: from the packed lot back to the dough, the semi-finished lots and the raw materials.

- Packaging lots are loaded from Warehouse > Packaging(see the Warehouse & Traceability section).
- Bills of materials WITHOUT linked sizes keep producing a sellable lot directly, as always.
- The linked bill of materialsof a pack size is set in the Product Registry(«Linked bill of materials» field): that link decides which BOM the Packing consumes the dough from. The CPF mirrors it read-only and computes costs on it.

Cancelling a recorded production

- From Warehouse > Traceability > Production lots — full detail, open the lot and press Annulla produzione(reason mandatory): the raw material, semi-finished and packaging lots that were consumed get their quantities back(a tracked reversal in the stock ledger — nothing is deleted) and the produced lot is zeroed and marked «cancelled».
- Cancelling is only possible while the produced lot is still intact in stock: if it has already been consumed by a later production, shipped with a delivery note or scrapped, the operation is refused with the reason. It works at every level of the chain: semi-finished, dough and packing.

Batch Lookup

Batch Lookupis the read-only page that gathers all saved production runs and reconstructs their traceability, from the production batch up to the product. You find it in the Production area, under **Batch Lookup**(Production > Batch Lookup).

What the view shows

The page starts from the data you have already entered: every saved production run becomes a batch row. For each batch, KoreLab automatically reconstructs the production > recipe > product traceability chain, so you can see which product and which recipe (with its version, when present) the batch belongs to.

At the top, above the list, you find two counters always updated according to the active filters:

- the number of runsfound
- the total kg, calculated as the sum of the actual kg of the filtered batches

Each batch is marked with a status and a colored badge:

- Completed(green badge)
- Draft(gray badge)
- Archived(red badge)

If a batch has a status other than these three, the badge still shows the raw status value with a neutral style.

How to — look up a batch

- Open the Production area and select Batch Lookup.
- Use the search box labeled at the top (placeholder "Search by batch, recipe or product…"): the search matches every word you type against the batch code, the recipe name, the product name and also the names of the batch's ingredients. All the words you type must appear somewhere among these fields.
- Narrow down with the filters in the same bar: Fromand Tofor the date range, the Productfilter (dropdown with initial entry "All products") and the Recipefilter (initial entry "All recipes"). The dropdowns list only the entries actually present in the production runs.
- The Statusfilter appears only when more than one status exists among the runs; when present, it lets you isolate, for example, Completed runs only (initial entry "All statuses").
- To clear everything press º Reset filters(the button appears only when at least one filter is active).
- Click a batch row to open the full detail.

How to — choose the view

At the top right, next to the counters, you find two buttons to change how you read the batches:

- Table: a flat list with one row per batch and the columns Batch, Date, Product, Recipe, Act. kg, Unitsand Status.
- Tree: a hierarchical Product > Recipe > Batches grouping, where the Product node shows the batch count and total kg, and the Recipe node in turn shows its number of batches and total kg; click a node to open or close it.

When the page opens, the default view is **Tree**; the active button stays highlighted.

What happens

The page is read-only and does not modify any data: it neither creates nor touches tables and only reads the existing production runs, so you can safely consult it at any time. The chosen filters and the selected view (Table or Tree) are remembered during the browser session, so you find the same setup if you come back to the page. Batches are always sorted from newest to oldest by batch date, both in the table and inside each tree node.

What you get — the batch detail

Clicking a batch opens a detail card with the heading **Batch detail**and the batch code highlighted, which summarizes:

- Product, Recipe(with the version next to it, if present) and Date
- the Statusof the batch, with the same colored badge as in the list
- the Target kgand the Actual kgof the run
- the number of Unitsand the Weight/unit (kg)

Below the summary you find the batch's **Actual ingredients**table, with, for each ingredient, the recipe quantity ("Recipe qty (kg)" column), the quantity actually used ("Act. qty (kg)" column) and any notes. Ingredients changed compared to the recipe are highlighted in yellow and carry the **modified**label; child rows (sub-components) are shown indented with the derivation symbol >. If the run has free-text notes, they are shown at the bottom in the **Notes**panel. To close, use the **Close**button at the bottom right or the **×**at the top.

Special cases

- If you have not saved any production yet, the page shows the message "No production saved yet. Runs created on the Production page appear here": the list fills up as you record production runs.
- If you have runs but the active filters find no matches, the message "No production found with the current filters" appears: loosen or reset the filters.
- When a batch is linked to a specific version of the recipe, the version from productionnote appears in the detail, useful for understanding which formulation it was produced with.
- If a batch has no recorded ingredients, the message "No ingredient recorded" appears in the detail instead of the table.

Plan notes

Batch Lookup is part of the Production area and has no plan restriction: it is available on all plans that include Production, with no dedicated limits or upgrade locks. It generates no signatures, calculations or automations: it is a pure consultation view built on the production data you have already entered.

Roadmap — where batches are headed

In the **Roadmap & Changelog**section you can see the progress status of features. For batches, the **Warehouse & Batches**evolution is planned (scheduled for August 2026): management of incoming and outgoing lots with full traceability, expiry dates and stock levels, plus a production > batch > technical sheet link for recalls and regulation-compliant traceability. As long as this item remains **Planned**, Batch Lookup covers the consultation and traceability of the production runs already recorded.

PRODUCTION

Labels

The **Labels**module (Production > Labels & printing) composes and prints three label types in a few steps — **Product**, **Batch**and **Logistics**— each with the right barcode, reusing the data you already have (technical sheet, EAN, batches, pallet logistics sheet): nothing new to enter.

The three label types

- Product: the sales label under EU Regulation 1169/2011 — name, ingredients with allergens highlighted, net weight (with the .mark next to it, when the product has it certified on its registry page under Directive 2009/34/EC), batch, best-before/expiry, nutrition table (energy in kJ and kcal, fat and of which saturates, carbohydrate and of which sugars, fibre, protein, salt in the legal order), the Food Business Operator's address (from the company Profile) and instructions for use. It is generated from the product's technical sheet.
- Batch: an internal traceability label with the product, batch number, net weight (with the same .mark when certified), dates and a batch barcode.
- Logistics: a package/carton label with the consignee, the palletization TI-HI data, the piece count per package and a GS1-128barcode built for logistics.

How to

- Open Production > Labels & printingand pick the type with the Product / Batch / Logisticsselector at the top.
- Choose where it picks from with the Search among Product / Bill of materials / Semi-finishedselector: Bill of materialslists every confirmed bill of materials, semi-finished ones included (handy for an internal label on the dough); Semi-finishedlists the semi-finished batches actually in stock. With Product, if your company has more than one warehouse, the Warehousefilter narrows the list to one of them (usually already set to the main one). Search and choose the entry from the list (for Batch it's optional but recommended: it pre-fills the name and barcode).
- Fill in the fields offered for that type: Batch— you can also pick it from the batches actually in stockfor the product, which pre-fills the expiry on its own —, Best before/expiry(one single field for both concepts: you can type the date in digits only, e.g. «300426» for 30 April 2026 — typed digits are always read day-month-year, exactly like a printed date, regardless of the app's language — KoreLab recognises it on its own, or open the calendar; choosing the product pre-fills the expiry already, if it has one configured on its registry page), and for Batch also the Production date(with the Prefill from a productionshortcut, which pulls the batch/date/product from an already saved production run); for Logistics the Consignee(you can also pick it from an active customer); for Product the Instructions for use.
- Choose the Label formatfrom the mm presets (they vary by type: e.g. 100×70, 90×60, 60×80, 60×40 for Product; dedicated formats for Batch and Logistics) or Custom size (mm)…to enter a Widthand Heightof your own.
- Choose the Barcode type: Automatic(picks one on its own based on the type and available data), EAN-13, EAN-8, Code 128, ITF-14 (case)or GS1-128 (logistics)— the latter is the default for Logistics and encodes several pieces of information together (GTIN, batch, expiry) with the FNC1separators the standard requires.
- Set the number of Copiesand the Print onmode: Rollor A4 sheet(the roll prints a single label at a time, sized exactly; the A4 sheet lays out as many labels as fit the chosen format in a grid).
- Check the Barcode previewto confirm at a glance that the data is correct before printing.
- Press Print to send it straight to the printer (see «Printing straight to the printer» below), or Download PDF, Print from browser or Share.

Counting cartons for Logistics

For the Logistics label, instead of typing the number of **Copies**by hand, you can enter **Number of pieces**and **Pieces per carton**(the latter pre-filled from the product's packages if configured, with a dropdown if the product has more than one): KoreLab works out on its own how many full cartons are needed, and if the division leaves a remainder it prints one extra label for the partial carton — e.g. 104 pieces ÷ 10 per carton = 10 cartons of 10 pieces plus 1 of 4 — each with its own wording «Contains N pieces of…». You only need to fill in one of the two methods: **Copies**stays available as long as **Number of pieces**is empty.

Warnings

- If the product's technical sheet isn't filled in, the Product label shows the warning "Technical sheet not filled in: the product label will be incomplete (ingredients/allergens missing)".
- If the product has no package with a configured pallet, the Logistics label shows the warning "No package with a configured pallet: add the logistics sheet on the product's registry page" (see the Packaging > Pallets and Pallet logistics sheet chapter).
- Choosing a small format (under 45 cm²) for the Product label shows the "Small format" warning: the full sales label (ingredients + nutrition table + producer address) might not fit entirely; it's fine for a batch/essential label, for sale it's better to use a larger format (e.g. 90×60 or 100×70 mm).

Printing straight to the printer

The **Print** button sends the label to the printer in one click. For that to work you need a free program installed on the computer, **QZ Tray**: it is the bridge between KoreLab and the printer, because a web page on its own cannot talk to a printer. You install it once and it stays there.

KoreLab recognises the printer from its name and picks the best route by itself, always telling you which one it will take in the line under the selector:

- Recognised thermal label printers (Zebra, Citizen, TSC and older-generation Zebras): the label is sent in the printer's own language, and the printer draws text and barcode with its own electronics, at its own resolution. This gives the best possible result.
- Any other printer (Epson, Brother, Dymo, the office printer…): the PDF is sent to the system, exactly as when you print any document. It always works.

If the name is not enough to identify the model — which happens with printers that emulate another brand's language — you can correct **Print language** and **Print density** by hand: the choice is remembered for that printer.

First-time setup: two steps, once per computer

1. Install QZ Tray. Download it from the **Download QZ Tray** button in the card at the bottom of the Labels page. It is free and open source, and it exists for Windows, Mac and Linux. After installation it stays running in the background: you can spot it by the icon near the clock (on Mac, in the top bar).

2. Install the KoreLab certificate. This removes a confirmation prompt: for safety, QZ Tray asks permission every time a website wants to print, and without this step you would see that window for every label. The certificate tells QZ Tray that KoreLab is a site to trust, and the prompt goes away. From the same card at the bottom of the page:

- On Windows — press Download for Windows, then open the downloaded file with a double click. Windows asks for confirmation to continue as administrator: this is normal and only needed to write the certificate into the folder where QZ Tray is installed; answer Yes. A black window opens, tells you what it is doing and ends with «Done».
- On Mac — press Download for Mac, then open the downloaded file. The first time, your Mac may say it comes from an unidentified developer: in that case right-click the file and choose Open, then confirm. You will be asked for your Mac password, because the certificate has to be written into the program's folder.

The file installs nothing and goes online for nothing: it writes a single text file inside the QZ Tray folder and restarts the program at the end. If one day you want to undo it, just delete that file, which is called **override.crt**.

How to tell it worked

Go back to KoreLab, press **Detect** next to Printer, choose yours and print a test label. If no confirmation window appears and the label comes out, you are done.

If something goes wrong

- «QZ Tray does not appear to be running»: the program is closed. Open it from the Start menu (on Mac from the Applications folder) and try again.
- It still asks permission on every print: the certificate was not installed, or QZ Tray was not restarted. Close it from the icon near the clock, reopen it and try again; run the downloaded file again if needed.
- The file says QZ Tray is not installed: do step 1 first.

• You would rather install nothing: Download PDF always works and needs nothing. Then print from your PDF reader at 100%, never with «fit to page»: any resizing moves the barcode bars off the print grid and the scanner can no longer read them.

If your IT people handle it

Certificate only, to copy by hand downloads the certificate on its own: it goes, named **override.crt**, into the QZ Tray installation folder (on Windows `C:\Program Files\QZ Tray`, on Mac inside `QZ Tray.app/Contents/Resources`), then QZ Tray is restarted. That is exactly what the double-click files do.

Printing labels straight from a document

There is no need to retype product, batch and expiry: the document already has them. The **Labels** button appears in four places and always opens the same window:

• Administration > Delivery notes and shipments, on a delivery note row: it proposes one product label for every pack shipped and one logistics label for every box, counted from the boxes on the document.
• Administration > Invoices, on an issued invoice: it traces each line back to the delivery note it came from and picks up batch, boxes and expiry.
• Production, on the green confirmation right after «Save production» or «Confirm packing»: it prints the labels for the batch you have just recorded.
• Warehouse > Stock, on a finished-product lot row: this is how you reprint the labels of a lot recorded some time ago.

In the window the labels are split into two tabs, **Product** and **Logistics**, because they need different sizes and therefore different rolls: they are printed in two runs. Each row shows where it comes from (line number, batch, quantity, boxes) and how many labels it produces: the tick leaves a row out, the number on the right corrects the copies. Size, printer, preview and printing are the same as on the Labels page.

Before printing, the window says line by line what is missing: technical sheet not filled in, batch missing, boxes not stated, box different from the one on file (in that case it prints the one on file, so the barcode does not say something different from the text), quantity by weight with the number of labels estimated from the weight of one pack. If a product on the document is not on file, the row is shown but cannot be printed.

What happens

• The calculation and preview are always live: changing the product, format, symbology or fields updates the barcode and data immediately.
• No data is ever saved by the Labels module: it always reads the latest data from the technical sheet, the product registry and the pallet logistics sheet.

Plan notes

The Labels module is included on **all plans**, with no dedicated limits: it has no plan gate.

SALES

Products

The Products section is the list of your finished products with their CPF (Finished Product Cost), their selling prices and their margins. You'll find it under the Commercial menu > Products (the menu item is **Products**). From here you filter, edit and duplicate products, and keep prices aligned with real costs thanks to automatic recalculation. **The product itself is born elsewhere**: in **Product Registry**(Catalog group). This page no longer creates new products — it only opens the CPF of existing ones.

At the top you'll find a filter bar (search, Status, Sort, categories and subcategories), followed by the list itself. The list can be viewed in two ways: as cards (Grid view) or as an editable margins table (Table view). The "n products" count and, when present, the "page x/y" indicator appear below the filters.

How to: create a product

- Go to Product Registry(Products menu, Catalog group) and press New product.
- Enter name and code (proposed from the name, editable only before the first save) and press Save.
- On the newly created record, the Create the CPFbutton appears: open it to enter the bill of materials (ingredients), labor, yields and weight loss, packaging and margins. When you save the CPF, the product shows up here with its calculated CPF — it is the sameproduct, same `id`, created in the Registry.

How to: edit or duplicate a product

- To edit, click the product card (the whole card is clickable) or use the Editbutton: it opens the CPF of the existing product.
- To duplicate it, use the Duplicatebutton: it opens a new entry in Product Registry, pre-filled with the name followed by " (Copy)", with new identifiers for ingredients and packaging; confirm the name and code there, then press Create the CPFto complete the copy.
- The button opens the form to add a note or deadline linked to the product (it appears if the Notes module is active).
- If the product has a linked technical sheet, the Sheetbutton appears on the card and opens the Technical Sheet (it appears only if the Sheet module is active).

How to: delete a product

- On the card, press the red button.
- The "Delete product" window appears with the confirmation message: choose Cancelto back out or Confirmto delete.
- After deletion you can still undo the operation through the undo notice that appears on screen: permanent deletion on the cloud only happens if you don't undo.

How to: filter and sort the list

- Type in the Search product…search field to search by name, code, category, subcategory or ingredients.
- Use the Status:buttons to filter between All, Ok(prices aligned) and Needs update(with the number of products whose prices have changed shown in brackets).
- With the Sort:menu choose between Most recent first, Name A>Z, Name Z>A, CPF “(highest first) and CPF ‘(lowest first).
- Click a category chip to filter by category; if the category has subcategories, a second row appears with Alland the subcategory chips. The All categorieschip clears the filter.

Producer filter (multiple) and search

If you have products with a **Producer**filled in (the field lives in Product Registry, together with the forkintravel integration), a **Producer:**row appears below the filters with one chip per producer present in the list. One click **includes**it (green chip with **+**in front: shows ONLY that producer's products), a second click **excludes**it (red, struck-through chip with **-**: hides that producer), a third click removes it from the filter — includes and excludes combine freely, even across several producers at once. The **reset**button clears everything. The **Search product…**field also searches by unit of measure and producer name, besides name, code, category and ingredients. The **Table**view also shows the **Producer**column.

What CPF, Wholesale, Retail and Pcs mean

- CPF is the Finished Product Cost calculated per piece: it adds up the cost of raw materials, labor, the batch's variable and fixed costs, and the packaging cost.
- Wholesale and Retail are the two selling prices, calculated from the CPF by applying the margins and commissions you set in the editor.
- Pcs is the number of pieces obtained from the batch, given by the net weight (after weight loss) divided by the weight of a single piece.

How to: quickly tweak margins in Table view

- At the top right of the filter bar, press Tableto switch from the card view to the margins table.
- For each product the table shows the editable columns Whsl.Marg.%, Whsl.Agent%, Ret.Marg.%, Ret.Agent%and, on the right, the calculated values Wholesale P., Retail P.and CPF.
- Edit a value directly in the cell: the row is highlighted (yellow background) to indicate there are unsaved changes.
- Press the Updatebutton that appears at the end of the row to save: prices are recalculated and saved. If you haven't touched anything, instead of the save button you'll find the button, which opens the full editor.
- To go back to the cards, press ž Grid.

What happens: automatic cascade recalculation

- When you change the cost of a raw material or a packaging item, or the default supplier, KoreLab automatically recalculates the CPF of every product that uses them: you don't have to redo the math by hand.
- If the new CPF differs from the saved one (beyond a small technical tolerance), the product is flagged as "needs update": the card gets an orange border and the badge, and the count on the Needs updatestatus filter goes up.
- When there are products to update, a notice (toast) appears telling you how many products were recalculated.
- If the cost inputs are incomplete (for example a referenced raw material or semi-finished product is not yet available), the product is NOT recalculated or flagged: this prevents the CPF from being wrongly lowered when not all the data has been loaded.
- Saving a linked bill of materialsalso recalculates on its own every product that uses it: if the CPF moves, those products get flagged as "needs update" with the reason "Bill of materials cost increase/decrease", exactly as for a raw material or a packaging item.
- In the CPF, the bill of materials' quantities and ingredients are not editable: the only per-row customization is the supplierchoice. The calculation always follows the most up-to-date linked bill of materials; to change a quantity or an ingredient, edit the bill of materials, not the CPF.

What happens: the cost-change banner on the card

- On the card of a flagged product, a colored box appears explaining the change: Costs +x%(in red, if costs went up) or Costs -x%(in green, if they went down), with the old>new comparison of CPF, Wholesale and Retail (the old value is struck through).
- The Keep old pricesbutton freezes the previous prices: the product goes back to "ok" but is marked as having manually kept prices (see below) and does not take on the new cost.
- The button on the right adopts the change: it is called Update ‘if costs went up, Update “if they went down, or Acceptif the change is neutral. In all cases the product returns to the " Ok" status.

What happens: manually kept prices

- If you chose Keep old prices, the card shows the notice " Prices kept manually — edit to update".
- This means the price no longer follows the updated CPF: to realign it, open the product for editing and save it again.

Plan notes: prices and margins

- The CPF is calculated on all plans, including Free.
- Selling prices and margins (Wholesale and Retail) are available from the Starter plan upwards: on the Free plan those fields appear locked in the editor with the note "Prices and Margins available from Starter" and an upgrade prompt.
- The starting margin values for a new product are the defaults set in Settings (normally 30% margin and 10% agent commission on wholesale, 60% margin and 0% commission on retail).

Plan notes: tags and multiple selection

- Custom tags and their filters are a Pro plan feature. If you are not on Pro, instead of the tag filters you'll see the line " Tag filters available with the PRO plan" with an Upgradebutton.
- On Pro, if you have defined tags in Settings, you get the Tags:filter row, checkboxes on the cards and the Select all/ Deselectbutton to assign the same tags to several products at once ("n selected — Assign tags:" bar).
- Tags can also be toggled on the fly on a single card, from the row with the icon.

Plan notes: product limit

- The number of products depends on your plan: Free up to 5 products, Starter up to 20, Pro (as well as Quality and Consultant) unlimited.
- The limit applies at creation time, now in Product Registry: once reached, saving a new product is blocked with a notice ("Plan limit […]: max N products") that sends you to the upgrade page.

Special cases

- The Products section is part of the Commercial area: it is visible on the Free, Starter and Pro plans, but not on the Quality and Consultant plans, which do not include the commercial side (prices and margins).
- The list is paginated: if there are many products, the page controls («« ‹ … › »») appear at the bottom and the "page x/y" indicator shows below the filters. Pagination applies to the Grid view.
- The filter state (search, category, subcategory, status, sorting) is remembered between visits within the same browser session.

Price Lists

The Price Lists section lets you create a professional price list of your products, with prices and company details, ready to hand to customers, agents or retail outlets; you'll find it in the app's Price Lists tab (icon).

How to

- Open the Price Liststab.
- In the List namefield, type the title (e.g. "Wholesale Price List 2025"): it's the large text shown at the top of the document. If you leave it empty, the document reads "Price List".
- Set your company logo with Upload logo(or Change logo/ the red one if you already have a logo): choose an image file from your computer. The logo is resized automatically and shown in the header, at the top left next to the title. It's the same company logo used in the other documents too, so if you change or remove it here it applies everywhere.
- Below, in the Additional information (below the products in the PDF)block, you can write one or more note lines (e.g. "Prices exclude VAT"). Use Add rowfor more lines and the red one to remove a line. Empty lines are not printed.
- In the columns block (under the Columnsheading), tick which data to show. The options are CPF, Wholesale P., Retail P.and Pcs/Carton: click the colored labels to turn them on or off. All four are on by default.
- Choose the products from the grid at the bottom: use the search field , the category chips (plus the Allrow for subcategories) to filter, then click the cards or the checkboxes to select them (a selected card turns green).
- To select in bulk, use the Quick selectrow: Select all(adds all currently filtered products, showing in brackets how many there are), Deselect all, or the "+ Category name" buttons to add a whole category in one go. The counter on the right shows how many products you have selected.
- Press Previewto see the price list laid out exactly as it will come out.
- From the preview page, use Download PDFto generate the PDF, or Print PDFto print. For the spreadsheet file use Export CSVinstead: this button is only on the main Price Lists screen, not in the preview.

What happens

- The preview and the documents group products by categoryand subcategory: each category has a dark bar, each subcategory a light bar, and inside is the table with the Productcolumn plus the price columns you ticked. Products without a category end up at the bottom under "No category".
- The header shows the logo, title, today's date and the number of products; on the right, the company details appear (legal name with legal form if any, VAT number, address, email, website) if you have filled them in in the company settings. The website is shown only if it is not a "localhost" address.
- At the bottom of the document you'll see the Additional informationlines you entered and the wording "Made with KoreLab" with the date.
- The downloaded file name is composed automatically from the list name and today's date (e.g. Wholesale_Price_List_2025_2026-06-17.pdf for the PDF, with a .csv extension for the CSV export).
- The Previewand Export CSVbuttons stay disabled until you have selected at least one product. The same goes for Save price list, with one exception: when you are extending an already saved price list, it stays active even without new selections (see below).

The available columns

- CPF— the finished production cost calculated for the product.
- Wholesale P.— the wholesale price.
- Retail P.— the retail price.
- Pcs/Carton— the pieces per carton; taken from the product's secondary packaging and, if that's missing, from the value set manually, if any.

Show only the columns you want the recipient to see: for example, you can remove **CPF**from a price list meant for customers and leave only the selling prices.

Saving and reusing a price list

• After selecting the products, press Save price listto archive it. A saved price list is a "snapshot": prices are frozen at the moment of saving, so it stays valid even if you later update your costs.
• Open the list with the Saved price listsbutton at the top right (it shows in brackets how many you have).
• For each saved price list you see the name, the number of products, the " prices frozen" notice and the date, plus three buttons: Openreopens it in preview with the frozen prices; Extendlets you add more products to an existing price list; deletes it (with a confirmation prompt).
• When you extend a price list, a blue notice appears at the top with the products already saved: select the new products from the grid and press Update price list, or Cancel editingto leave without saving. You can remove an already frozen product using the next to its name.

Special cases

• You can change the number of columns of the product grid with the three buttons at the top right of the selection row (automatic ¦, 2 columns ¥, 1 column ¤). It's purely a viewing convenience and does not affect the final document.
• The Export CSVexport produces a file you can open in Excel or Google Sheets, with products grouped by category and subcategory; it's useful for reworking the data or printing it from a spreadsheet.

Filter by tags (Pro plan)

This feature only appears if you have created custom tags on your products. With the **Pro**plan, the grid shows a **Filter:**row with your tags (to show only the products with a given tag, with a **reset**button when any filter is active) and, after it, an **Add to price list:**row with **Tag name**buttons that show the number of products in brackets and add them all to the price list in one go. On lower plans, instead of these rows you'll see a " Tag filters available with the PRO plan" notice with an **Upgrade**button; the rest of the price list creation remains available.

Plan notes

• Creating the price list, the Previewand the Export CSVare available on all plans.
• Print PDFand Download PDFare reserved for the Starterplan and up: on the Free plan the two buttons appear as Print (Starter+)and Download PDF (Starter+)and take you to the upgrade page.
• Filtering by custom tags requires the Proplan.

The price lists for forkintravel

• When the forkintravel module is on, KoreLab keeps two lists dedicated to the channel: FiT(the full price) and FiT Offer(the discounted price, the one shown on the site as a promotion).
• A product with no rowin «FiT Offer» is simply not on offer: that is not a zero discount. And a discount higher than the full price is refused — on the site it would become a struck-through price cheaper than the headline one.
• Prices in these two lists are VAT excluded, like every KoreLab price list: it is the channel that brings them to gross using the product's VAT rate.
• Ô Neither of them ever feeds the prices of your own documents (orders, invoices, printed price list): they stay the marketplace channel and nothing else. For the same reason they cannot be deleted from the price list manager.
• For products sold by weightthe list price is per kilo: towards the shop window it is converted into the price of the pack by multiplying it by the weight. If the weight is missing the price is notupdated — yesterday's price beats a per-kilo price shown as the price of a pack.

Advanced analytics

Analytics is KoreLab's advanced analysis module: it reworks the data you have ALREADY entered (invoices, orders, inventory, production, receivables) and presents it in ready-made dashboards, with nothing to enter. You'll find it under the Commercial menu > **Analytics**. Everything is read-only: you consult it, compare periods and export to CSV.

How it's organised

At the top you pick the **Period** (last 3, 6 or 12 months, year to date, previous year or a custom range) and you can turn on **Compare with previous period**: percentage changes appear on the cards and, in bar charts, the previous period shows as grey bars alongside. Below are four tabs: **Sales**, **Production**, **Finance** and **Explore**.

Sales tab

- Headline KPIs: period revenue (VAT included, the same figure as the Dashboard), document count, average ticket, active customers, each with the change vs the previous period.
- Monthly revenue trend.
- Top customers and best-selling products (net of VAT).
- Margin by product: the average price actually sold minus the product's live cost (CPF); products below margin are highlighted.
- Sales by channel (direct, marketplace, e-commerce, receipts) and customer ABC analysis (classes A <=80%, B <=95%, C).
- Sales and accrued commissions by agent, new vs returning customers, order status.

Production tab

- Inventory value (raw materials, finished goods, packaging), raw materials below stock, quantity produced.
- Yield by recipe: how much was produced against how much was consumed, with the trend over time for the selected recipe.
- Scrap incidence in euros and value at expiry risk split by band (expired, within 7 days, 8-30, 31-90, over 90).
- Food cost trend, raw material usage, below-stock detail and inventory for the accountant (period-end valuation, exportable to CSV).

Finance tab (Business plan only)

- Monthly revenue vs costs, banded receivables and payables aging (not yet due, 0-30, 31-60, 61-90, over 90 days).
- DSO (days sales outstanding), overdue by customer, VAT by rate (sales, deductible purchases, receipts), top suppliers.
- Cash-flow forecast over 8 weeks from due dates and commissions to settle by agent.

Amazon: what the channel really earns (Business plan only)

The **Amazon** tab answers a different question from the accounting statement: not "how much Amazon paid out", but **how much you actually earn**. It cross-references channel movements with each product's real VAT rate and with the purchase price in the product record, and closes on a P&L for the channel.

SKUs that do not match

For the P&L to be complete, every Amazon SKU must correspond to a product in your stock: without that, the revenue enters the account but the cost does not, and the result looks better than it is. KoreLab tries to match them on its own using the product code, item code, legacy code, alias and EAN.

When it cannot, the **SKUs with no cost** card lists them with a drop-down next to each: **pick the stocked product yourself** and press "Match". The match is saved, applies to future periods too and takes **precedence** over the codes in the product record — if you set it, it is because the automatic match was wrong. On Amazon the same product often carries several SKUs over time (relists, FBA and FBM, old listings): you can match them all to the same product.

Manual matches are listed in the **Manual matches** card, where "Remove" undoes them. If an SKU is already matched but still has no cost, the match is not the problem: that product has no purchase price (a default supplier with a price, or a CPF).

Explore tab

Free-form analysis: pick a **dimension** (customer, product, agent, channel, month, category) and a **measure** (revenue, quantity, margin, document count) and you get a table and chart, both exportable to CSV.

Alerts

When a value crosses a threshold (product below margin, low yield, value at expiry risk, rising collection time) an alert appears at the top of the tab. Thresholds are set in **Settings > Notifications**, Analytics category.

Plan notes

- The Sales and Production tabs are included from the Pro plan.
- The Finance tab is included in the Business plan; on a Pro plan the tab shows an upgrade prompt.
- On the Free and Starter plans the Analytics item appears as a locked preview leading to the upgrade page.

Orders

The Orders section (Commercial menu > **Orders**) manages **customer orders**and **supplier orders**. The key concept: an order is a **commitment**, not a warehouse movement — the availability shown is **stock - committed**, and the warehouse only moves downstream, at shipment (customer orders) or at goods arrival (supplier orders). At the top you find the two selectors **Customer orders**and **Supplier orders**.

How to: create a customer order

- Open Orders > Customer orders.
- In the New customer ordercard choose the Customer(search in the records or free text); if you wish, fill in Customer order ref.(the customer's own reference for the order — optional), the Order dateand the Requested delivery.
- Add the lines: product (the price is pre-filled from the product's price list, editable), quantity, unit (pcs, kg, L, cartons) and price. Below the product you immediately see "avail.n" (stock minus committed) and the FEFOhint (the released lot closest to expiry); if you ask for more than available, the number turns red.
- With + Add lineyou insert more products; at the bottom you see the Total.
- Press Save draftor OK Confirm order.

What happens

- On confirmation, the order commitsstock: the ordered quantities are subtracted from the "available" shown everywhere (without touching real stock).
- Also on confirmation, KoreLab generates the FEFO advice: a suggestion that indicates, line by line, which lot to ship (first to expire, first out). You find it by opening the order's card, where you can accept or dismiss it: at shipment you still choose the lots yourself.
- If you filled in Customer order ref., the reference cascades into the following documents — delivery note, invoice and any XML — and prints only if you filled it in: an order without a reference shows nothing there.

Customer order statuses

Draft > Confirmed > Preparing > Shipped > Partial > Delivered(plus **Cancelled**). Open the order's card and use the "> status" buttons to move forward; the available transitions depend on the current status. These are the **logistics**statuses: the ones you decide.

The order number, the channel reference, and going back

Every confirmed order gets its **KoreLab number**(`ORD-C_00001`for customer orders, `ORD-F_00001`for supplier orders): it is assigned **on confirmation**, never on a draft, so a progressive is never burned on an order that might stay a draft forever. On orders from connected channels, the **«Channel ref.»**also appears next to it (e.g. `AMZ_405-…`): the number the marketplace and the customer know the order by, different from the KoreLab number — handy for looking it up on Seller Central or answering a customer ticket.

If a status is wrong — a «Shipped» set by mistake, an order stuck partway — the © **[status]**button next to the forward buttons sends the order back to the allowed previous status. It does not touch invoicing: that is derived from the linked documents, not from this status.

Invoiced is no longer written by hand

The order's fiscal side — «Invoiced», «Receipt issued» — is no longer a status to tick: KoreLab **reads it from the linked documents**. As soon as you issue an invoice or a receipt that comes from that order (or from one of its delivery notes) the badge appears on its own; void the document and it disappears on its own. There is nothing left to remember, and an order flagged by mistake no longer exists. The badge is **clickable**and takes you to the document. Orders where the customer asked for an invoice at checkout show the **«Invoice requested»**mark until the invoice exists.

On channel (B2C) orders the two statuses are separate

Delivery and administration are two different things, and now you read **both** of them side by side: the truck icon says **where the goods are**, the sheet icon **which tax document covers them**. It used to be a single badge, and the second one hid the first — once an order read «Invoiced» you could no longer tell whether it had left, and on a shipped one you could not tell whether it had been invoiced. Now a row says, for instance, **Shipped**and **Invoiced**together.

- The administrative badge stays clickableand takes you to the document; where there is none it says so («No document»), which on channel orders is the norm: the channel records the takings.
- Orders imported from the previous system show «Invoiced elsewhere»and, on delivery, «Delivery not stated»: nobody ever stated it, and KoreLab does not invent it. Set it yourself with the status buttons if you need to.
- B2Borders (your own) keep the single badge as always.

How to: tracking on a channel order

- Open the order's card and press Add tracking(or Edit tracking).
- Pick the carrier from the menu: BRT, GLS, DHL, SDA, Poste Italiane, TNT, FedEx, UPS.
- Type the tracking number and, if you want, the shipping date. Press Save tracking.

The carrier is picked from a menu and no longer typed by hand for a precise reason: that value travels all the way to the online shop, which uses it to **build the tracking link**inside the email the customer receives. A hand-typed carrier («Poste», «poste italiane») is not recognised, and the email goes out **without the «Track your shipment» button**: the customer is left with the number alone. If you open an old order with a hand-typed carrier, KoreLab keeps it and flags it, so you can replace it with an entry from the list.

On Amazon orderssome carriers are in Amazon's official list (GLS, DHL, TNT, FedEx, UPS); for the others (BRT, SDA, Poste Italiane) Amazon records the name spelled out. The shipment is confirmed either way, and KoreLab tells you which case it is **before**you save.

Tracking on a channel order **does not stop inside KoreLab**: it is sent to the channel, which emails the customer and — on marketplace orders — confirms the shipment to Amazon. If the channel rejects it, KoreLab saves nothing: tracking stored only at home would be tracking the customer never sees.

How to: generate the delivery note from an order

- Open the card of a Confirmed, Preparingor Partialorder.
- Press Generate DDT: Delivery notes & shipments opens with the order preselected and the lines pre-filled with the FEFO lots.
- One order can generate several DDTs(partial deliveries): on the first shipment it moves to Partialand stays selectable; you close it as Deliveredonce everything has shipped.
- When every line of the order has been shipped, the order closes itself as Delivered: you no longer have to mark it. This only happens when KoreLab is certain line by line (delivery notes created from the order picker); on older or hand-made delivery notes closing stays manual.

How to: create an invoice or a receipt from the order

- Open an order's card (from Confirmedonwards).
- Press Create invoiceor Create receipt: the document opens already pre-filledwith the order lines, the customer and their tax details.
- If the order is not marked as delivered yet, KoreLab points it out and asks you to confirm — but does not block you: when to issue the document is your call.
- On saving, the document goes to its own section and a clickable badgeappears on the order to take you back to it.

A receipt and an invoice are alternatives: they cannot coexist on the same sale (it would be the same amount counted twice). If the customer asks for an invoice after you issued the receipt, use **«Turn into invoice»**on the receipt: it voids the receipt, removes the takings entry from the register and opens the invoice. If you try any other way, KoreLab stops you and explains why.

How much has been fulfilled

In the order card, next to the ordered quantity, the **Fulfilled**column shows how much has already gone out with the delivery notes, line by line (for example «6/10»). When the count is certain the number is exact; if the order has older delivery notes without the line-by-line link, the value carries a tilde (**~**) because it is an estimate matched by product name.

B2B orders and channel orders

Orders are split into two lists: **B2B orders**(the ones you create) and **B2C orders (channels)**, which flow in on their own from the online shop and the marketplaces. The latter are never created or edited by hand — you review, ship and invoice them — and they show **channel, carrier, tracking and shipping date**when the channel reports them. The new-order form, for both customers and suppliers, now sits behind the **New order**button: the page stays clean and the list reads at a glance.

How to: create a supplier order

- Open Orders > Supplier orders.
- If you have raw materials below minimum stock, the box "∓η materials below minimum stock to reorder" appears at the top: the Prepare supplier orderbutton pre-fills the lines with the missing quantities (net of what is already incoming from other orders).
- Otherwise fill in by hand: Supplier, date, Expected deliveryand the lines (raw material, quantity, unit, price). Below the raw material you see the stock and any "incoming" amount.
- Press Save draftor OK Send order.

Supplier order statuses

Draft > Sent > Confirmed > Partial > Received > Closed(plus **Cancelled**). Goods arrival is recorded in Warehouse: the order acts as a reference and feeds the "incoming" figure.

Partial and Received advance on their own. Once you record an intake **linked to the order and to the exact line**(see below), KoreLab doesn't wait for you to touch the status: as soon as the first goods arrive the order moves to **Partial**on its own, and once every line is covered it moves to **Received**on its own. A historical or manual intake without that link doesn't advance anything by itself: it stays a manual close via the "> status" buttons.

Closing an order before everything arrives. If the supplier won't deliver the rest, the goods arrived but were logged outside this flow, or the order shouldn't have been placed at all, you can still press **> Received**or **> Closed**: KoreLab asks for the **reason**among these three and keeps it on record on the order — no need to wait for the intake to justify it on its own.

How KoreLab measures received quantity

The physical fact is the **raw-material lot**: it keeps the quantity that actually arrived, even after that stock is consumed in production. When an intake is linked to a supplier order, KoreLab keeps both the order header and the exact source-line index; a **rejected** lot does not fulfil the order. Historical or manual intakes without that link remain explicitly unreliable: KoreLab never guesses the order from supplier, date or name and never closes anything automatically on an assumption.

Actions on the card

- Send— opens the menu with Email(the new entry, at the top), then Print, Shareand WhatsApp. Printgenerates the Order confirmation(customer) or the Purchase order(supplier) with your company's details: the document comes out in Italian; if the other party is from another country it comes out in Englishon its own.
- > [status]— moves the status forward.
- Delete— deletes the order; for about 10 seconds you can undo the deletion with © Undo.

How to: send the order by email

- From the order card open Send > Email.
- The recipientis proposed from the records (the customer on a customer order, the supplier on a supplier order): editable.
- Pick the textfrom the Preset texts, the «Email with document»group («Order confirmation (customer)»or «Purchase order (supplier)»), or write it on the spot. The available variables are {destinatario} {riferimento} {numero} {data} {azienda}: {riferimento}is the whole phrase («n. 12 del 26/08/2026») and disappears on its own if the order is not yet numbered.
- Check the previewof what actually goes out.
- Press OK Send.

What happens

- Sends the document from KoreLab's own channel, with the PDF already attached— the order confirmation on a customer order, the purchase order on a supplier one. Unlike Share, which opens the phone's share sheet and sends the email from the user's own mail app: from there KoreLab doesn't know whether it went out, can't annotate it on the document and can't send a copy to anyone.
- The send stays recorded on the order: date and recipient, visible on the card.
- The email text and the PDF follow the recipient's language(from the country in the records), as already happens for printing.
- The entry does not appearon cancelledorders, on quotes, or on customer order drafts(a «confirmation»of an order not yet confirmed is a promise that hasn't been made). It does appear on a supplier order draftthough: sending it to the supplier IS the act of ordering.

How it works: orders coming from connected channels

- Orders pulled from the bridge (online shop, marketplaces) carry the status declared by the channel(for example «Preparing» or «Shipped»): they are sales that happened, not commitments to prepare, and they do not hold stock.
- In Settings > forkintravel you can switch on «Take the sold goods out of the warehouse»: every incoming order creates a shipment without a delivery noteand removes the goods from the earliest-expiring lots (FEFO), like a delivery note would but with no numbering and no document. No fiscal document is ever created.
- It applies only to orders dated on or after the day you switch it on: history is never re-applied, otherwise months of sales already counted by hand would go out a second time.
- If an order is already linked to a shipment (including one you made by hand), it is not taken out again.
- If the warehouse holds less than what was sold, only what is theregoes out: stock never goes below zero, the order is flagged to you with a notification and is not confirmed to the shop window, which keeps holding that availability itself.

How it works: how much stock the shop window sees

- What KoreLab declares available to the channel is not the raw stock figure: it is released lots only(a lot awaiting test results cannot be shipped), minus open orders, minus the safety bufferyou set in Settings > forkintravel.
- A product with no stock is worth zero, never «unlimited».
- Orders coming from that channel are notsubtracted twice: the channel itself holds them until it hands them over to us.

Special cases

- If the cloud is unavailable the "Local mode" banner appears: orders stay on the device.
- The Orders module can be turned off from Settings > Modules.

Plan notes

- Orders are a Businessplan feature.

Cascading discounts on lines ("5+5")

Next to each line price (customer AND supplier orders) there is the **Discounts**field: it accepts a single discount (e.g. 5) or a cascade (e.g. 5+5, 10+7+3.5). The cascade is progressive: 5+5 equals 9.75%, because the second discount applies to the already-discounted price. The order total accounts for it, and when the invoice or the receipt is created from the order the discounts **travel with the line**and appear on the document (in the invoice XML as separate discount blocks, as required by the Exchange System).

How to: record an intake from a supplier order

- Open a Sent, Confirmed or Partial supplier order and press Record intake: KoreLab opens Warehouse > RM Intake with that order already selected.
- Pick one of the lines still to receive. KoreLab proposes raw material, remaining quantity and unit, and keeps the exact order and source-line link.
- Read the Supplier lot and, when present, the Expiry from the goods: the order cannot know these physical facts and KoreLab never invents them. Adjust the proposed quantity for a partial arrival, then press Record intake.
- The received line shrinks or disappears and the next one is proposed. A rejected lot stays out of fulfilment; a manual or historical intake is never linked by similarity.

At this stage the intake records the physical fact and the remainder, but it does not change the order status by itself: automatic transitions are enabled only once their rule is complete and reliable.

CRM — sales opportunities

The **CRM**section (menu Sales > **CRM**) keeps your sales opportunities on a board with one column per stage of the deal: from where they are born to when you win or lose them. The page's subtitle says it from the start: where they stand, what they are worth, which ones have stalled. The CRM does not replace the customer registry: an opportunity becomes a customer only when you convert it yourself, with an explicit action (see «From opportunity to customer» below) — it never happens on its own, not even when you win it.

The board

Each column is a stage (at first opening: New, Qualified, Proposal, Negotiation — rename them to whatever you like, see «Your stages» below). Each card is an open opportunity and shows the name, the company (if filled in), the estimated value next to the probability and — when there is something to say — the next planned step or the notice that it has stalled. Drag a card into another column to move it forward or back: KoreLab applies the transition rules on its own (for instance, you cannot move an already-closed opportunity without reopening it first). Click a card to open it for editing.

How to: create an opportunity

- Press New opportunityat the top right.
- Write What the opportunity is— the title of the deal, not the customer's name (e.g. «Canteen supply 2027»): it is the only required field together with the stage, which already starts on the first column.
- In Companysearch among your existing customers to link the opportunity, or type a new name: it stays free text until you convert it (see below). Picking an existing customer, KoreLab fills in company, email and phone on its own if they were still empty — it never overwrites something you already typed by hand.
- Fill in Contact person(the person you actually talk to — a field of its own, not a tail of the company), Email, Phone, How it came in(a trade fair, the website, word of mouth, a customer who referred you…), Estimated value, Probability(leave it empty and it counts as the stage's default) and Expected close.
- Press Save.

Priority and labels

Every opportunity can have a **priority**(Low, Medium or High — you find it in the edit form) and one or more of your own free **labels**: they let you group opportunities however you like (by trade fair, by product, by area…) and never change the score or the pipeline in any way. High priority is the only one that gets an attention-grabbing color, both on the board and in the List View.

How to: create or manage your labels

- At the bottom of the page, open Your labelswith Manage labels.
- Type the name and press Add(or Enter). Renamechanges the name while keeping the label on every opportunity that already carries it. Deleteremoves it from every opportunity that carries it — KoreLab tells you first how many that is, and it cannot be recovered by re-creating one with the same name (it is born with a new identifier, unrelated to the previous one).
- You can have up to 20; past that, delete one before adding another.

To assign a label to an opportunity, open its card: under the main fields you find a button for each of your labels, one click turns it on or off for that opportunity.

The score

Every opportunity has a **score**from 0 to 100 (the «Score» column in the List View), calculated by KoreLab to help you see at a glance which deals deserve attention first. It is not a judgment on the customer: it sums five signals worth twenty points each — you filled in email, phone and contact person; you already have a next step planned; you wrote an estimated value; you know where the opportunity came from; how far it has moved through the stages compared to the first one. Hover the mouse (or press and hold on a phone) over the number to see how much each factor is worth for that opportunity: the score is never a number to trust blindly, it is always explainable from where you read it.

How to: decide the outcome

- Open the card and press Mark as won(probability rises to 100%, the opportunity leaves the board and moves among the closed ones), or choose the reason from the «Why did you lose it?» menu and press Mark as lost: a reason is always required, among Price, Timing, Competition, No responseand Other— the list is fixed, you cannot customize it (unlike the stages).
- On an already-closed opportunity the button becomes Reopen: it goes back to open, at the stage it was in.
- Delete, at the bottom of the card, removes the opportunity; it asks you to confirm before actually doing it.

The four totals above the board

- Open— how many opportunities you have open right now.
- Estimated value— the sum of the value of every open one; if some have no value filled in, under the number you find how many stay out of the count («N with no estimated value»).
- Weighted value— each opportunity's estimated value multiplied by its probability: what you can actually expect to bring in, not the sum of everything.
- Won out of closed— the percentage of won opportunities out of the total closed ones (won + lost). Until you have closed at least one, the figure does not exist, and KoreLab shows a dash instead of a made-up «0%».

The stage funnel

Below the totals, if you have at least one opportunity, you find the **Stage funnel**chart: how many opportunities reached at least each stage (won ones count in all of them, lost ones up to where they stopped, open ones up to where they are now) and the pass-through rate from one stage to the next. This is a different question from the board, which only shows where open opportunities stand RIGHT NOW: on a healthy pipeline the board's last column is almost empty — whoever gets there is won and leaves — and reading it as a funnel would say the opposite of the truth. At the bottom you find the percentage of those who reach the last stage and then win. There is no history of the moves: an opportunity you created directly at an advanced stage also counts as having passed through the earlier ones — this is stated in the help note (the 9icon) next to the chart's title, not hidden.

Next steps

Every saved opportunity has its own **Next steps**panel, under the card's buttons (an opportunity not yet saved does not show it: a step is always attached to a deal that already exists). At the top you see the **last contact**— the last activity you marked done, or «You have not been in touch yet» — and below it the list of planned steps.

How to: plan a step

- Write What you have to do(e.g. «Call the purchasing manager back…»).
- Choose How: Phone call, Email, Meeting, Documentor To do. This is the label and icon you see in the list and on the board's card. Two types behave differently from the rest:
- - Choosing Phone callalso shows Call outcome, with the options — none —, Reached, No answer, Call backand Not interested: it is a closed list on purpose, so it always answers the same question («who did I talk to, and how did it go»). The free-text detail of what was actually said stays in Notes; changing the type after picking an outcome clears the outcome on its own.
- - Choosing DocumentKoreLab warns you that the attachment is added right after saving the step (it needs the row already written, not a draft): once saved, the Attachmentspanel appears under the step — the same shared document archive you use elsewhere in KoreLab (calibrations, batches, training, non-conformities, invoices): the file is never copied onto the activity, only linked.
- Set a due date in By(it starts already filled in with today, editable) and any Notes.
- Press Add step.

Each step is checked off with **Done**(it goes back to **To do**if you reopen it by mistake) or removed with **Remove**; on a phone call with a recorded outcome, the type label in the list also shows the outcome (e.g. «Phone call · Reached»). On the board's card, the next step not yet done shows as a reminder under the opportunity's name, with its icon and due date.

Time in a stage

Under the value and the probability, every open card shows how many days it has been in its current stage («8 days in this stage» — you also find it as a column in the List View). Past 14 days the tag turns into a colored warning: it does not mean the deal is in danger, it only means nobody has moved it in a while. It is a different signal from **stalled**opportunities below: that one says nobody has decided the next step yet, this one says the step of moving it forward has not come yet — the two can be true together or separately.

Stalled opportunities

Below the board, when there are any, you find the box of **stalled**opportunities: open ones with no usable step, for one of two reasons — **no step planned**(you have not decided yet what to do) or **N days overdue**(the step was there, the date has passed). It is not a judgment on how the deal is going: it is how a deal goes quiet without anyone noticing, which is why it shows up even for a small deal. On the board's card the same notice takes the place of the next-step reminder, as a colored tag. The same alerts also appear in the **What to do today**box on the Dashboard: clicking them opens the CRM directly.

The opportunity's journal

Every saved opportunity keeps a **journal**: the history of everything that happens on the deal, from the most recent. It holds two kinds of entries — **notes**that you write, free-form, and **automatic events**that KoreLab records on its own every time you change the opportunity's stage or outcome (for instance «Stage changed from "Qualified" to "Proposal"» or «Moved from Open to Won»). Automatic events are never written by you and cannot be edited or deleted: they are the objective record of what happened, not an opinion.

How to: add a note

- Write the text in New note.
- Press Add note.

Every note can carry an attachment (press **Attachments**on its row): the same shared document archive you use elsewhere in KoreLab — the file is never copied onto the note, only linked. A note is removed with the button next to it; an automatic event cannot be.

Recording conversations

On any saved opportunity you can keep the audio of a conversation — a phone call or a meeting — either by uploading a file you already have or by recording from the device's microphone. It is meant to document the deal, not to evaluate who is speaking.

The first time: activating the feature

Before you can upload or record anything, your business needs to activate the feature once: press **Activate the feature**, write your name and role (the Data Protection Officer, if appointed, is an optional field) and confirm with two separate checkboxes — that you will use the feature only with customers or prospects, never to record employees or internal staff, and that you will use it only to document the conversation in the CRM, never for staff analysis, scoring, profiling or aggregate statistics. These are two distinct commitments, both required: one is about WHO gets recorded, the other about WHAT the recording is for. Once activated by one user in your business, everyone else already finds it active.

How to: upload or record a conversation

- Press Upload filefor an audio you already have, or the microphone button to record the conversation as it happens.
- Before the audio is saved, KoreLab asks for consent: it explains to the other party that you are recording only to document this conversation on the record — never for tone-of-voice analysis, scoring, profiling, model training, aggregate statistics, marketing or

sharing with third parties — and you check the two boxes that state you said so and obtained consent, and that the other party is a customer or a business contact, never an employee. If the other party does not consent, nothing happens: the conversation continues normally, without being recorded.

- When recording from the microphone you can listen back before confirming: the audio stays on the device until you give consent.

Retention and verification

Every recording is kept for a limited time, then it needs to be checked before it gets deleted: when the deadline arrives, KoreLab asks you to listen to it one last time and confirm («I have listened, confirm»), or — once only — to push the deadline back. It is not meant as a permanent archive.

Transcription and reviewing the draft

When the transcription engine is active, KoreLab transcribes and summarizes the conversation on its own shortly after the upload. The result never becomes a journal note by itself: it is born as a **draft to review**, which you have to read and possibly correct before deciding its fate — **Approve and create the note**turns it into a real journal note, **Discard the draft**throws it away. This is a required step, not an extra convenience: an automatic transcription of a phone call can get things wrong, which is why AI-generated text always passes in front of a pair of eyes before it ends up written on a customer's record. A draft not reviewed within a few days is discarded on its own.

How to: manage your stages

- At the bottom of the page, open Your stageswith Manage stages.
- To rename a stage press Rename, type the new name and Save(or Enter). The name stays what you chose even if you switch the app's language: a stage is a label of your business, not a piece of interface text.
- Move earlier/ Move laterchange the order of the columns on the board.
- Turn offdeactivates a stage: it disappears from the board but stays in the history of whoever already passed through it. If it still holds open opportunities, KoreLab stops you and tells you how many to move first. Turn back onputs it back in play, with no conditions.

Next to each stage you see its default probability and, if it holds opportunities, how many.

Opportunities outside the stages

If an opportunity stays open at a stage that was deactivated in the meantime, it does not disappear: it stays alive in the database but does not appear in any column of the board, so KoreLab lists it in its own box (below the stalled opportunities). Open it and move it to an active stage, or turn back on the stage it came from.

The List View

Next to the board there is a second view, in table form: you find it with the toggle at the top right, above the board. Unlike the board, which only shows still-open opportunities, the List View shows all of them — open, won and lost — with a column for each piece of data (company, contact person, stage, status, value, probability, last contact, priority, labels, time in stage, score). Search, filter by stage/status/priority and export what you see to CSV.

How to: save a combination of filters

If you already have a search, filters and a view (board or list) that you use often, press **Views**, give it a name and **Save view**: you find it again in the same menu next time, and one click brings it back. Saving with the name of an existing view updates it instead of creating a second one; you can have up to 20. They are personal — only you see them — and are also saved to the cloud on your profile, with an indication of whether the save is still pending or failed.

How to: act on several opportunities at once

Check the opportunities you care about in the table's first column: a bar appears with the actions available on all of them together — change stage, mark them won or lost (with a reason), reopen them, export them to CSV or delete them. If some of the selected opportunities cannot receive the action (for instance an already-closed one that cannot change stage), KoreLab applies it to the ones that can and tells you how many were left out, without blocking the rest.

From opportunity to customer: the conversion

On any already-saved opportunity — open, won or lost, not only the won ones — you find the **Create the customer in the registry**button, unless a customer is already linked (in that case you see «Already in the customer registry: name» with the link icon). It is a deliberate step, never an automatic effect: KoreLab never creates a customer on its own, not even when you mark an opportunity as won — an opportunity with no linked customer for months is the norm, not a defect to fix.

How to

- Fill in at least the Companyor the Contact person: one of the two becomes the new customer's name. The deal's title can never become it, because that name ends up on invoices.
- Press Create the customer in the registry: KoreLab shows you what is about to happen — the customer that is created, the fact that the opportunity stays linked to that record, how many contact details (contact person, email, phone) move into the customer record — and waits for your confirmation.
- Confirm: the customer enters the registry (you find it under Customers) and the opportunity stays linked to that record forever. A second click never creates a second customer with the same name.

Importing from another system

At the bottom of the board you find the **Bring in your opportunities from the program you used before**card: it imports a history of deals exported from the program you used before (it reads any file with columns similar to a standard CRM export). It is closed by default: it is a once-only action, done when you switch systems, not an everyday operation.

How to

- Open the card with Open.
- Choose How the columns are separated(comma, semicolon or tab) and the Decimal signused in the file.
- Load the file with Choose the file to read, or paste the content into the text field below.
- Check the previewbefore importing: how many rows are readable and how many are left out (with the row number and the reason), the total value of what you are about to import, which opportunities will land in the default stage because their stage was missing from the file or did not look like any of yours, and which had no title (they take the company name). If some amounts could be read two different ways depending on the decimal sign, KoreLab flags it with the total you would get choosing the other sign, next to the current one.
- Press Import N opportunities.

What happens

- Nothing is written until you press Import: the preview is only a calculation.
- Every imported opportunity comes in as open, even the ones already won or lost in the old program: you mark the outcome afterwards, from its card.
- If the file carries a priority or labels, KoreLab recognizes them: the priority comes in as is, labels are matched only against the ones you already created in your registry (Your labels) — a name with no match is left out, and the preview tells you so, instead of inventing a new label on your behalf.
- If the file carries a note or a description, it becomes the first entry in that opportunity's journal.
- Importing always adds: reading the same file twice creates the opportunities twice.

Plan notes

- The CRM is a feature of the Businessplan.

Special cases

- Opportunities are saved online only: if you are not connected, KoreLab tells you right away («You are not connected: opportunities are saved online only») and does not attempt a local fallback save, unlike other modules such as Orders.
- If the cloud cannot be reached for reading, you see a warning and the last copy saved on this device, which may be out of date: it does not mean your opportunities are gone, only that this particular read did not succeed.
- The CRM module can be turned off from Settings > Modules.

Administration — Overview

The **Administration**group gathers KoreLab's document and financial side: delivery notes (DDT) and shipments, sales and purchase invoices, receivables and payments with a due-date schedule, agent commissions, banks and payment types. It is the part of the management system that turns warehouse and orders into tax documents and money.

Current status: private testing

The complete invoicing suite (FatturaPA XML, transmission to the Italian Exchange System — SdI, credit notes, receivables, commissions) is currently in a **private testing phase**: the Administration menu entries are visible only to the internal testing account. If you don't see them in your menu, that's expected — at launch they will be enabled as **Business**plan features. In the meantime, delivery notes can still be marked "invoiced" from Shipments, as always.

The full flow

- Orders(Commercial group) — you record the customer's order: it commits stock but does not move the warehouse.
- Delivery notes & shipments— you ship the finished product lots: the warehouse is unloaded and, if you want, a numbered delivery note (DDT) is issued.
- Invoices— from the delivery note you create the deferred invoice (TD24), issue it (the number is assigned only on issue), generate the FatturaPA XML and transmit it to SdI.
- Receiptsand Takings— the retail sale path, the one that does NOT go through an invoice: the receipt is the document you give the customer, the takings register is the obligation that replaces the till receipt and the invoice.
- Receivables & payments— you record collections on issued invoices and payments of supplier invoices; the schedule shows the uncovered installments.
- Agent commissions— invoices with an agent accrue commissions, which you settle periodically.

In parallel, the **Purchases**view inside Invoices imports the invoices received from suppliers (XML/P7M) and registers them with the purchase ledger protocol number.

The group's entries

- Delivery notes & shipments— shipments, DDT issue, proof of delivery.
- Invoices— sales (from DDT, credit notes, advance invoices, pro-forma, XML, SdI) and purchases (supplier invoice import).
- Receipts— the retail sale document: numbered with its own series, as a PDF, and recorded in the takings register.
- Takings— the daily takings register by VAT rate, with the automatic breakdown and the generation from connected channels' orders.
- Receivables & payments— schedule, collections, payments, credit note offsetting.
- Agent commissions— agent records, accrued amounts, settlements.
- Banks— your company's accounts for bank transfers/RiBa.
- Payment terms— the payment types (method + installments) proposed on invoices.

Before you start

- Fill in the Company profile(Quality > Settings > Company profile): VAT number, tax code, tax regime and full address are needed for the invoice header and the XML. If they are missing, the Invoices module warns you.
- Complete the Customersrecords with the e-invoicing data (VAT/tax code, SDI recipient code or PEC, full address).
- Set up Banksand Payment termsso IBAN and due dates are proposed automatically on invoices.

Plan notes

- All Administration entries are Businessplan features: on other plans they show the upgrade invitation.
- While private testing lasts, the entries do not appear in other accounts' menus and the pages show the "coming soon" announcement.

Delivery notes & shipments

The **Delivery notes & shipments**page (Administration menu) records the shipments of your finished product lots and, when needed, issues the numbered **DDT**(transport document) with a PDF printout. The shipment unloads the warehouse and records where each lot went — the basis of traceability and of the recall test, which remain in **Warehouse**.

Fundamental rule: only **released**finished product lots can be shipped. If you have lots awaiting release, a notice appears: release them first from Lots & Stock. **Dough**and **semi-finished**lots (reserved for production: they are consumed by Packaging) stay **out of the list**— a note tells you how many were excluded, and the **Show anyway**checkbox re-admits them, labelled, for intentional cases such as selling a semi-finished product to another producer. In Lots & Stock and in the stock PDF these lots carry the 'dough'/'semi-finished' label.

How to: record a shipment with a DDT

- Open Administration > Delivery notes & shipments.
- (Optional) If the shipment originates from an order, pick the order from the From customer ordermenu: customer and lines are pre-filled with the lots chosen in FEFO logic (first to expire, first out), with quantities capped at availability. Lines with no available lot are flagged.
- Leave the Issue DDTtoggle on (it's the default): the shipment will receive a progressive DDT number and the printout. Turn it off only for shipments without a document (direct delivery, samples, immediate invoice accompanying the goods): in that case only the warehouse is unloaded.
- Choose the Customer / recipientfrom the records (or type a free-text name). The Manual DDT no.field is optional: the official number is assigned automatically.
- Fill in the Carrier / courierif needed.
- Fill in the Quality checks and transport conditions(printed on the DDT): reason (sale, return, on approval, samples, transfer, third-party processing), conditions (ambient, refrigerated 0–4 °C, fresh, frozen) with the measured temperature, packaging integrity, external appearance, the Suitable and clean vehiclecheckbox and the inspection notes.
- With + Add lotenter the lines: finished lot, quantity (the box turns red if it exceeds availability), packagetype and number of packages (proposed automatically from pieces per package, editable). At the bottom you see total packages and weight.
- Press OK Record shipment.

What happens

- The warehouse is unloaded of the shipped lots; the DDT number (progressive/year) is assigned on issue.
- If the shipment comes from an order, the first shipment sets the order to Partial: one order can generate several DDTs (partial deliveries) and you close it as Deliveredfrom Orders once everything has shipped.
- If multi-warehouse is enabled, the shipment uses the active warehouse's stock.

Actions on recent shipments

Each row in the list is a card: **press it to open the full detail**— the lines with lots, quantities and packages, DDT number and date, ship-to address, carrier, quality/transport checks and proof of delivery.

- Edit transport(in the open detail) — corrects the carrierand the quality/transport checkseven after issue. Lines, number and date stay frozen: to correct those, reverse and record a new shipment. A DDT already covered by an issued invoice cannot be edited until you unlink the invoice.
- Mark delivered— opens the Proof of delivery(POD): recipient's name, note and a photo/scan of the signed DDT as an attachment.
- Create invoice— opens the Invoices module with this DDT preselected (see the Invoices section).
- Mark invoiced— marks the DDT as invoiced without creating the invoice in KoreLab (for those who invoice elsewhere).
- Send > Email— in the Sendmenu it's the first entry, before Print, Share and WhatsApp: sends the DDT to the customer from KoreLab's own channel, with the PDF already attached. Unlike Share, which opens the phone's share sheet and sends the email from the user's own mail app, this one goes out directly from KoreLab. Editable text, savable among the Preset texts(the «Email with document» group), address proposed from the customer records, and a preview of what actually goes out. The send stays recorded on the document: date and recipient, visible on the card. It does not appear on cancelledDDTs.
- Print DDT— generates the transport document PDF.

Plan notes

- DDT numbering, PDF, order linking and proof of delivery are Businessplan features.
- The page is currently in private testing(see Administration — Overview): at launch only the Business requirement will remain.

Sales invoices (from DDT to SdI)

The **Invoices**page (Administration menu, **Sales**view) creates the sales invoice from the **DDT**(deferred invoice, TD24), issues it with automatic numbering, generates the **FatturaPA XML**and transmits it to the **Exchange System**(SdI) through the integrated provider. Golden rule: the number is assigned **only on issue**— drafts never consume numbers.

How to: create an invoice from a DDT

- Open Administration > Invoices(Salesview).
- In the Create invoice from DDTcard, pick the DDT from the menu: it lists shipped or delivered DDTs not yet invoiced. (You can also get here with the Create invoicebutton in Delivery notes & shipments.) If the same customer has otherDDTs not yet invoiced, KoreLab offers: "This customer has N other DDTs to invoice: include them all in a single deferred invoice?" — a summary invoice always covers a single customer: DDTs from different customers stay on separate invoices.
- The draft opens with the DDT lines already filled in: prices come from the linked order (if the unit matches) and VAT from the Products records — everything can be corrected before issuing.
- Check the document fields: customer, type (TD24 deferredfrom DDT or TD01 immediate), date, VAT chargeability (I immediate / D deferred / S split payment).
- On the lines you can adjust quantity, price, the cascading discounts(Discounts field: a single 5 or 5+5, 10+7+3.5 — progressive: 5+5 equals 9.75%) and/or the € discount, and the VAT codefrom the catalog (rate or exemption nature with its legal reference; "Other rate / nature" for manual cases). Below the lines you can add more even without starting from a DDT: + Product(searchable: type the name and find it instantly) inserts a line already filled in with the price from the price list and the product's VAT; + Free linea line with manual description and amount (for services or to build several rates/summary); + Chargetransport/packaging/collection charges (art. 12: the rate follows the goods). Every line, even when it's the only one, can be removed with the .
- At the bottom: document discount %, rounding (max ±€0.99), reason, wording, PA fields (CIG, CUP, document reference), agent and commission %, and the Paymentblock (choose the type: it generates the concrete installments; Regenerate due datesrecalculates them; the proposed IBAN is the default bank's).
- Press Save draftto resume later, or OK Issue invoice.

Invoice from several DDTs: grouped print and frozen references

When the invoice comes from several DDTs, the lines stay **grouped by DDT**— in print and in the XML — with the heading **«DDT n. X del …»**above that document's lines and, at the end, an **«Other items»**section for lines added by hand (this is the art. 21 §4 requirement: the invoice must be able to trace which DDTs each line comes from). The DDT references are **frozen**onto the invoice at the moment of issue: if you later edit or delete those DDTs, the invoice keeps printing the same references — they never change silently.

What happens on issue

- The progressive number (per year) is reserved with an atomic operation on the cloud: this is why issuing requires a connection— offline the invoice stays a draft.
- The source DDTs are marked invoiced.
- Issuing is blocked if required data is missing (customer, quantities, prices, VAT or nature): the error message explains what to complete. No automatic defaults on a tax document.
- The €2 stamp dutyis computed automatically when VAT-free operations exceed €77.47; you can re-charge it to the customer as a line with the dedicated checkbox. Under the flat-rate regime (RF19) lines are pre-filled with nature N2.2.

Numbering series

By default invoices have a single numbering: 1, 2, 3… per year. If your accountant asks you to keep **separate ledgers** — say one for catering and one for retail — you can declare several **series**: the number restarts from 1 inside each one, and the document reads **0001/A/2026**. This is what the Italian Revenue Agency ruling no. 1/E of 10 January 2013 allows. If you declare none, nothing changes: the usual numbering stays.

- Go to Settings > Company, Numbering series block, and press + series.
- Type the code (letters and digits, at most 4: it is what ends up inside the document number) and, if you want, a label to remind

you what it is for.
• Mark which one is the default: it applies when you don't choose.
• The channel field is optional (see below).

How to pick the series on an invoice

In the draft, next to VAT chargeability, the **Numbering series** field appears — only if you declared at least one. The first menu entry is not «none»: it tells you **which series will actually be used** if you don't choose (for example «Default — A»). Picking a different one applies **to that document only**.

What happens

• Each series has its own counter: 0001/A and 0001/B coexist without interfering.
• The series is fixed onto the document on issue, together with the number, and never changes after that: it is the one printed on the customer's copy and the one that goes into the transmitted file.
• If you remove a series from the settings, documents already issued with that code are untouched — their number has already been handed over — but its counter becomes unreachable.
• If a draft had picked a series that is no longer declared, KoreLab tells you in the draft itself: that document would be numbered without a series, so pick another one before issuing.

The automatic series per channel

If you also sell through connected channels, you can tie a series to a **channel**: invoices born from an order of that channel will use that series **by themselves**, without picking it every time. The channel code is the one shown in **Orders**, under «Channel ref.»; upper/lower case and spaces don't matter. Two series cannot declare the same channel, and KoreLab flags it. The choice made by hand on the document **always wins** over the channel, and an order arriving from an undeclared channel simply uses the default.

FatturaPA XML and sending to SdI

• On the issued invoice press Generate XML(then Download XML): the FatturaPA 1.9.1 XML is produced with a unique file name reserved on the cloud. If the customer has neither an SDI code nor a PEC, a notice reminds you the invoice will land in their Revenue Agency reserved area: hand them the courtesy copy. The XML also carries the phone and email from your company profile(Settings > Profile) as the sender's contact details: the format keeps them short (phone 5-12 characters, email 7-256 with a domain), and a value that does not fit is left out— never truncated, and the invoice is not rejected because of it. If your number does not fit with the international prefix, KoreLab writes it in its national form (+39 011 1234567 > 011 1234567); in the profile's Phone field a notice tells you if a contact detail cannot go in, and why.
• Press ⇒Send to SdIto transmit through the provider. Transmission deadlines are checked (TD01: 12 days; TD24: by the 15th of the following month): if you are late, sending asks for confirmation and flags the possible penalty.
• The SdI status updates by itself with the receipts: sent, delivered, deemed delivered, delivery impossible(the invoice IS issued: it is in the customer's tax drawer), REJECTED, and for the PA notarization/accepted/refused.
• If the invoice is rejected, for SdI it never existed: press Fix and resend, correct the data (number and date stay the same) and resend within 5 days.

The readable PDF inside the e-invoice

The e-invoice's XML file now also carries the document's **readable PDF**: the recipient used to get an XML their own software had to convert to display it, while with the PDF inside they can read it right away. It is **on by default**; you turn it off from **Settings > Account & Workspace**, the «Include the readable PDF in e-invoices» checkbox. In the send confirmation dialog (when it appears) there is a checkbox to exclude it for that single invoice. The file has a **5 MB**limit: if the PDF doesn't fit it is left out — never the invoice, which stays valid — and KoreLab tells you so, both when downloading the XML and when transmitting it. The PDF shares the space with any **manually uploaded attachments**on the invoice: if there isn't room for both, the PDF is the one that gives way first.

The other actions

- Print PDF— the invoice courtesy copy.
- Send to customer— emails the courtesy copy with the PDF attached: the address is proposed from the Customers records, the text from the "Courtesy copy" template of the Preset texts (variables {cliente} {numero} {data} {importo}). The sender is your company «(via KoreLab)» with replies going to your email — or directly your own mailboxif you configure SMTP in Settings > Email sending. In the Customers records you can enable, per customer, the automatic send on issue; the send (manual or automatic) stays annotated on the invoice. The text template used by the automatic send is chosen in Settings > Email sending(with a preview); if none is chosen, the first saved text in the "Courtesy copy" group applies, or the standard template.
- Share— opens the phone's (or computer's) share sheet with the PDF already attached and a message ready for the customer: you pick WhatsApp, Email or Telegram and press send. On mobile and the app the attachment goes by itself; on unsupported computers the app downloads the PDF and opens WhatsApp with the text so you attach it in one tap. No automatic sending — you are always the one who sends. The button also appears on the DDT(in Delivery notes & shipments) and on orders; for WhatsApp the number comes from the phone field in the customer records. The same Share is available on the certification/HACCP documents (self-control manual, registers, requirements, CCP, audits, management review, food defense, HACCP analysis, deadlines, warehouse stock register, recall test) and on the agent commissions statement, next to «Print PDF».
- Credit note— reverses the invoice with a TD04 (see the dedicated section).
- Cancel— only for issued, non-transmitted invoices: the number stays burned (progressives are never reused) and the DDTs go back to "to invoice". An invoice transmitted to SdI cannot be cancelled: it is reversed with a credit note. Cancelling is also blocked if the invoice has linked issued credit notes or offsets recorded in Receivables.
- Resume draft / Delete— drafts can be edited and deleted freely.

The invoice ledger

Above the list you find the filter bar: free search (number, customer, type, status, date…), the **Year**and **Month**dropdowns (they only show the years/months actually present in the ledger) and the **customer**dropdown to isolate a single customer's invoices — they all combine together, and the **clear filters**button resets them at once. Below, the double **card/table**view and the **Export view**button download exactly the filtered documents as CSV for Excel.

B2C e-commerce: receipts and the takings register

For e-commerce sales to consumers (indirect B2C e-commerce), Italian law does not require an invoice (unless the customer asks for one) but does require the entry in the **takings register**(registro dei corrispettivi, art. 22 Presidential Decree 633/72 and art. 24 Presidential Decree 633/72). At the bottom of the Sales view you find two cards:

- E-commerce receipts— the documentyou hand to the customer when the order ships: numbered per year (a series separatefrom invoices), lines at the grossprice (VAT included, as the customer sees it), with a ready PDFto slip into the parcel or send. You create it directly from the downloaded e-commerce order(channel orders don't go through DDTs: lines already at the channel price, VAT resolved from the records), from the shipment(for those who also issue a DDT) or by hand. On issue, the total is entered automatically into the takings register, one row per VAT rate, with the automatic VAT breakdown. If the order comes from an integrated channel that already writes the takings on its own, the «Enter in the register» checkbox starts unticked: never count twice.
- E-commerce takings register— the register itself: receipt rows land there on their own (marked «from receipt»: they are removed only by voiding the receipt, never by hand), other sales are entered as gross daily totals per rate. Export CSVproduces the register for your accountant.

Receipt rules: they are **not invoices**— never the invoice numbering, never XML/SdI, not valid for VAT deduction (the wording is printed on the PDF). **Voiding**burns the number (never reused), removes the rows from the register and the shipment goes back among the «DDTs to invoice». A shipment with an issued receipt **leaves**the «Create invoice from DDT» list: takings entry AND invoice on the same sale would be double accounting. If the customer **asks for an invoice**, use **> Invoice**on the receipt row: the receipt is voided, the takings entry reversed from the register (including the one written by the integrated channel, if the order came from there) and the **invoice draft opens pre-filled**with the same lines re-expressed as taxable amounts — complete the customer's tax code or VAT number and issue.

Filters on Receipts and Takings too

The **E-commerce receipts**and **E-commerce takings register**cards also have a filter bar above the list: the **Year**and **Month**dropdowns (for receipts also the **customer**) plus free search, to quickly isolate a period or a counterparty.

Plan notes

- Invoicing from DDT is a Businessplan feature and is currently in private testing: other accounts see the "Full invoicing coming soon" announcement.
- In local mode (no cloud) drafts stay on the device: issuing, XML and sending require a connection.

Credit notes, advance invoices and pro-forma

Besides the invoice, the Invoices module issues the other active-cycle documents: the **credit note (TD04)**and the **debit note (TD05)**reversing/supplementing an issued invoice, the **advance invoice (TD02)**and the **pro-forma**(non-fiscal). They all share the same numbering series as invoices: the progressive is unique.

How to: issue a credit note (TD04)

- Open the issued invoice to be reversed and press Credit note.
- The TD04 draft opens with the original invoice's lines pre-filled and the reference to the linked document.
- For a partial reversalreduce the quantities or delete the lines you don't want to reverse; for a total reversalleave everything as is. Amounts stay positive: the sign is in the document type.
- Press OK Issue credit note.

Credit note rules

- It can only be issued on an issuedinvoice (not on drafts, cancelled invoices or other notes).
- The date cannot precede the original invoice; the document discount is not allowed (you reverse actual amounts).
- There is a cumulative cap: across all credit notes issued on the same invoice, you cannot reverse more than what was invoiced per line.
- If the reversal covers the whole invoice, the source DDTs go back to "to invoice".
- Once issued, the TD04 becomes a customer credit: you close it in Receivables & payments > Credit notesby offsetting it against other open documents of the same customer or with a refund (see the Receivables section).
- The TD05(debit note) is the mirror document, for upwardadjustments: see below.

How to: issue a debit note (TD05)

Use it when the issued invoice charged **less than due**(price too low, larger quantity delivered, a cost left out). The upward adjustment is **mandatory**(art. 26 §1 Presidential Decree 633/72), and the debit note performs it while staying **linked**to the original invoice — which a brand-new invoice would not do.

- Open the issued invoice to supplement and press Debit note.
- The TD05 draft opens with the original's lines pre-filled and the reference to the linked document.
- Enter the differenceto be charged, not the whole amount already invoiced: correct the lines' price and quantity, and delete the ones that don't apply. If the correct price was €12 instead of the €10 invoiced, the note's line is worth €2.
- Press OK Issue debit note.

Debit note rules

- Like the credit note: only on an issuedinvoice (never on drafts, cancelled invoices or other notes), the date cannot precede the original, the document discount is not allowed.
- There is nocumulative cap: being a charge and not a reversal, it may exceed the original amount.
- It does not touch the original's DDTs and never sends them back to "to invoice", even when it covers the whole invoice.
- It increases output VAT in the sales register and in the period's VAT settlement, accrues commissionlike an invoice, and is collected like a normal invoice (it appears in Receivables & payments, and a credit note can be offset against it).

Note on an invoice from another system (cut-over)

In the first months after switching to KoreLab you may need a credit or debit note on an invoice **issued by your previous system**. Two paths: from the **Imported archive**(the **NC**/**ND**buttons on the row: lines prefilled from the imported document, editable) or, if the document was never imported, the **+ Note on external doc.**button under Other documents, typing the **number and date**of the original document as they appear on it. The reference goes into the note's **linked documents**, its PDF and its XML (art. 21). Beware: on a document not issued by KoreLab **it is impossible to check how much has already been reversed**— the cumulative cap remains your responsibility. If more than 12 months have passed since the original document, a notice recalls the one-year limit for downward variations due to a supervening agreement (art. 26 c.3): for other causes (termination, annulment, insolvency procedures) the limit does not apply — when in doubt, ask your accountant.

How to: advance invoice (TD02) and balance

- In the Create invoice from DDTcard, under Other documents, choose the customer from the + Advance invoice (TD02)…menu.
- Fill in the advance's lines: the VAT is the one of the operation the advance refers to (one line per rate if the order is mixed). Issue normally.
- When you invoice the balance (TD01/TD24 to the same customer), the draft shows the Deduct already invoiced advancesblock: press - Advance no./yearto insert the advance reversal line and the link to the document.

Advance rules

- You can only deduct an issuedadvance, of the same customer, and each advance can be deducted once only(a second balance cannot reuse it).
- The balance date cannot precede the deducted advance's date.
- With an advance reversal the document discount is not allowed.

How to: pro-forma

- Under Other documentspress + Pro-forma.
- Fill in lines and data like an invoice and press Save pro-forma: it is a non-fiscaldocument — it receives no number, generates no XML and never goes to SdI. It is used to anticipate the amount to the customer (quote/payment request).
- When the deal goes through, press Turn into invoice: the pro-forma becomes a real invoice draft, ready to issue. Alternatively you can print its PDF.

Send the pro-forma by email

The pro-forma now also has the **Send to customer**button, which used to appear only on **issued**documents — and an issued pro-forma never happens, because it's not a tax document and never goes to SdI. The email goes out from KoreLab with the **PDF attached**, editable text and the address proposed from the records.

The **text changes with the document type**: invoice, credit note, debit note and pro-forma each have different templates. On the pro-forma it does not say the original is coming through SdI (for this document that isn't true): instead it says the document **has no tax value and does not replace the invoice**. The send stays **recorded on the document**(date and recipient), and on the pro-forma the label reads «**Pro-forma sent on …**», not «courtesy copy».

Self-billing invoices(TD27, for gifts or self-consumption) and **integration documents**(TD16-19) do not have the **Send to customer**button: they are documents the company issues to itself — supplier and customer coincide — so there is no customer to send them to.

The **automatic courtesy copy**on issue (the per-customer checkbox in the Customers records) now applies to **all issued types**, not just invoices: it used to be limited because there was only one template.

Plan notes

- Like the whole invoicing suite: Businessplan, currently in private testing.

Receipts

The **Receipts**page (Administration menu) issues the **retail sale**document: numbered per year with its own series — separate from invoices — printable as a PDF for the customer, and with the total flowing on its own into the **takings register**, one line per VAT rate.

It is not an invoice. When selling to a private customer who does not ask for an invoice, this is the document. If the customer asks for the invoice **beforehand**, the document is created in **Invoices**; if they ask **afterwards**, use the **> Invoice**button described below.

How to: issue a receipt

- Open Administration > Receipts.
- Choose where to start from:
- - From order— for orders arriving from a shop or a marketplace, which never pass through DDTs because the channel ships them. Lines and customer are already filled in with the channel's prices.
- - From shipment— for deliveries with a DDT: lines, customer and prices come from the shipment.
- - + New receipt— everything by hand (on-site sale, market, trade fair).
- Check date, customer (optional: with no name it is a "retail" sale) and channel.
- Check the lines. The price is entered VAT included: it is the price the customer paid.
- Decide on the Record in the takings registercheckbox (see the box below).
- Press OK Issue receipt.

The «Record in the takings register» checkbox — the thing to understand

The sale must not enter the register **twice**. KoreLab already proposes the right choice, but it is worth knowing why:

- Direct sale(by hand, or from an order created in KoreLab): the checkbox is on. The takings line is written by the receipt.
- Order from a connected channel: the checkbox is off, and a notice says so. That channel writes the takings itself when the order comes in: recording them here too would count them twice.

What cancelling does

Cancelling a receipt **burns**the number (it is never reused: the series must stay continuous), its lines **leave**the takings register, and the linked shipment goes back to **invoiceable**.

How to: the customer asks for the invoice AFTER the receipt

This is the classic "I need an invoice" case. Press **> Invoice**on the receipt's row and confirm. In one move KoreLab: **cancels**the receipt, **reverses from the register**that sale's takings — including those written by the channel — and opens in **Invoices**the draft already filled in with the same lines, restated **net**of VAT. Complete the customer's tax details (tax code or VAT number, address) and issue it.

The sale thus moves from the takings register to the invoice cycle: **never counted twice**. If the linked order is no longer in the archive, KoreLab touches nothing and tells you so, because in that case it would not know which lines to reverse.

Why a separate number series

Receipts have their own numbering (1/2026, 2/2026…) independent of invoices: they are different documents, and mixing them would make both registers unreadable.

The single receipt's PDF is not the accountant's printout

Every receipt has its own PDF, handed to the customer. The **official**document to give to whoever keeps your books is a different thing: the **Monthly print for your accountant**card at the top of the **Takings**page, one block per receipt with the lines by VAT code (see the Takings section).

Plan notes

- Receipts are a Businessplan feature, currently in private testing(see Administration — Overview).
- They require the cloudand a filled-in company profile (the seller on the printout).

Which type of document you are issuing. Italian law knows **three** retail sale documents, and they are not synonyms: the **commercial document** (Ministerial Decree 07/12/2016), issued by those who electronically store and transmit their takings; the **tax receipt** (Law 249/1976 and Ministerial Decree 30/03/1992), which remains for those **exempt** from that transmission; and the **simplified invoice** (

Bringing in your history from another package. The **"Import documents from another package"**card reads a **CSV file**exported by the program you used before. The file does not need a particular format, and that is the point: **you are the one who describes it**— which character separates the columns, whether decimals use a comma or a dot, how dates are written, and above all **what each column you need is called in your file**(date, number and total are required; customer, tax code, VAT number, channel, notes and type are optional). That way the import works with any package, without KoreLab having to know it. Ĉ**The date format is never guessed, and this is not fussiness**: `03/04/2026` is 3 April here and 4 March elsewhere, and **both readings are valid dates**— a program that tries to work it out on its own gets it wrong without saying so, and moves the document into another month, that is, into another VAT settlement.

Look at the preview before importing. Below the mapping you get the **first rows already interpreted**, with dates and totals as KoreLab understood them: that is where you notice you picked the wrong format, **before**the documents exist. Rows that cannot be read are **listed with their row number in the file**, and they do not block the others: a 400-document file with three bad dates imports 397 and tells you which three to look at. **Two things to know**: imported documents arrive **without their breakdown by VAT rate**, so they stay **out of the register totals**until you state it from the "Breakdown to declare" card above; and a document with **the same year and number**as an existing one is **skipped, never overwritten**— you can run the import again without risking a change to an amount already reported.art. 21-bis Presidential Decree 633/72). In the creation panel the **Document type**field lets you choose between the first two: the choice changes the **legal wording**printed at the foot of the PDF — previously the same for everyone — while amounts, VAT and totals are untouched. Choosing nothing leaves **"Not stated"**, which is also the state of every receipt issued before this feature: KoreLab does **not assign**a type you did not choose, because that would mean stating on your behalf how an already-issued document is qualified.

Why a simplified invoice cannot be issued here. Because it is not a takings document: it is an **invoice**, and as such it belongs in the **issued-invoices register**, not the takings one — with its own numbering and its own electronic format (TD07). KoreLab **recognises**it — if a document is of that type its amount does not enter the takings register, nor does any refund of it — but does **not produce**it: that chain is not complete yet, and offering it would promise you something the program cannot finish. If you need one, **talk to your accountant**. Bear in mind it has limits of its own: it is valid up to **€400**in total (the limit set by the Ministerial Decree of 10/05/2019; the rule itself says 100, raisable to 400), it requires the customer's **tax code or VAT number**, and it **cannot be used**for supplies to other EU countries nor for reverse-charge transactions.

Takings (register)

The **Takings**page (Administration menu) keeps the **daily takings register**: how much came in, by VAT rate. It is the obligation that replaces the till receipt and the invoice in retail sales and in indirect B2C e-commerce (exemption unless the customer asks, but the **register is mandatory**— art. 22 Presidential Decree 633/72 and art. 24 Presidential Decree 633/72).

You record the **gross**total (VAT included) per rate: KoreLab computes the **breakdown**into taxable amount and tax.

The page's three cards

- Monthly print for your accountant— at the top of the page: pick the monthand yearand press Print. It is the official PDF to hand to whoever keeps your books: a block for every receipt issuedin the chosen month, with the lines by VAT code and the final summary — different from the "flat" register below, which lists lines without grouping them by document. If a receipt imported from another system has no VAT-code breakdown (the lines are missing), it stays out of the summaryand the printout flags it as needing review; if no receipt was issued in that month, the on-screen result says so and no empty PDF is produced.
- Takings register— the list of lines with date, VAT rate, gross, taxable amount, tax and channel, the total at the bottom, the period filter and two outputs for your accountant: Print PDFand Export CSV.
- Generate takings from imported orders— it appears onlyif you have a connected channel (shop, marketplace). See below.

How to: send the register to your accountant

- (Optional) Use the period filterto pick the year and month you need.
- Press Print PDF: you get a sheet with your company's letterhead, the declared period, the entries line by line and the summary by VAT rate(taxable amount, tax, total). The printout contains what you are looking at: if you filtered July, you get July. Export CSV, on the other hand, always exports everything and is meant to be imported into another program.
- This sheet is the accounting entry(art. 22 Presidential Decree 633/72 and art. 24 Presidential Decree 633/72), and the document says so itself: it is not the electronic transmission of takings, which is performed through a certified fiscal recorder or an accredited provider.

How to: add a takings line by hand

- Open Administration > Takings.
- Fill in date, VAT rate, grossamount and channel, then press + Add.

How to: record a channel's orders in the register

Orders keep flowing in on their own; the register does **not**, and that is intentional: entries are decided by a person.

- In the Generate takings from imported orderscard choose the period.
- Read the statement: line by line you see what would enter the register and what is already recorded.
- Confirm the write. �A line already in the register is never rewritten: you can re-run the generation without fear of duplicates.

Shipping costs: the VAT follows the goods

Shipping costs paid by the customer are part of the takings and go into the register like everything else — but they have **no rate of their own**: transport is an **ancillary charge** and takes the rate of the goods (art. 12 Presidential Decree 633/72). On an order of items taxed at 4%, shipping is at 4% too.

If the order contains **different** rates, shipping is **split in proportion** to the prices: one register line per rate, and the parts still add up exactly to the total the customer paid. Nothing to do: KoreLab works it out when it records the order.

If the sales channel declares a shipping rate that is **none of the rates of the goods** — the typical case being a flat 22% on a food order — the order is **held among those to review**, with the reason spelled out. The rate stays the one declared by the channel, because the channel is the source, but it no longer passes in silence: the fix belongs **in the channel's own settings** (its shipping VAT option), not here.

Free shipping is not shipping at 0%: if the customer pays nothing for transport there is no ancillary consideration at all, so no line appears — not even a zero one. And the courier's invoice that you pay is a **purchase** with its own input VAT: it has nothing to do with the rate you charge the customer.

Lines that cannot be deleted here

Lines labelled **"from receipt"**were generated by a receipt: to remove them you cancel the **receipt**(Receipts page), so that document and register always agree.

Plan notes

- The takings register is a Businessplan feature, currently in private testing.
- The cloudis required to save.

Periodic VAT settlement

The **VAT settlement**page (Administration menu) answers the question the registers alone don't close: **how much is there to pay**. It takes the period's output VAT (sales, takings, reverse-charge self-invoices), subtracts deductible input VAT on purchases, accounts for whatever was left over from the previous period, and gives you the figure, the **tax code**and the **due date**for the F24 form.

Where the figures come from

From the **VAT registers**, not from the documents. That is a deliberate choice: the total you read here is by construction the same one your accountant reconstructs from the ledgers you send them. If a document isn't in the register, it isn't in the settlement either — and vice versa.

How to: settle a period

- Open Administration > VAT settlement. The page opens on the last completed period, which is the one you are settling.
- Pick the yearand period. Monthly or quarterly depends on the frequencyyou set in Settings > Company profile > Tax configuration.
- Look at the two tables, Output VATand Deductible input VAT, broken down by rate, and below them the summary leading to the balance.
- Read the notes under Worth knowing: that is the part that prevents mistakes (see below).
- Save draft: the settlement stays editable and recalculates itself if you add or correct documents in the period.
- Once the figures have settled, Close the period.
- Print PDFfor the sheet to hand to your accountant.

Closing the period: what it means

A closed settlement **cannot be edited or deleted**. It is the figure that went on the F24: rewriting it afterwards would lose the trace of what you actually paid. If you spot an error, correct it **in the next period**— the same logic as credit notes and registers.

You cannot close a period while the **previous**one is still a draft: the credit carried over from it can still change, and the chain would say two different things. A notice tells you so.

When payment is due

- Monthly: by the 16th of the following month, no surcharge. Tax codes 6001-6012.
- Quarterly by option(the ordinary case): by the 16th of the second month after the quarter, plus a 1% surcharge as interest. Codes 6031, 6032, 6033. The fourth quarter is not settled on its own: it flows into the annual VAT return (code 6099, by 16 March) and carries no surcharge.
- "Natural" quarterly(art. 74(4): fuel retailers, hauliers…): never any surcharge, and the fourth quarter is settled on its own too (code 6034, by 16 February). You declare this with the dedicated checkbox in Tax configuration.

Due dates falling on a Saturday or Sunday move to the Monday, and those between 1 and 20 August move to the 20th (the mid-August extension).

The two things that can catch you out

- Below the minimum thresholdyou don't pay: the amount is added to the next period (art. 1(4), Presidential Decree 100/1998). The threshold is €100from the 2024 settlements onwards (it used to be €25.82), and the deferral has a ceiling: it cannot go past 16 Decemberof the same year. In practice November (for monthly filers) and the third and fourth quarters (for quarterly ones) pay even a few euros — the page says so with a notice rather than leaving you to suspect a bug.
- If the period closes with a credit, nothing is lost: it is offset against the next period (art. 30 Presidential Decree 633/72).

December VAT advance

On the year's last period the **December VAT advance** card appears (art. 6, Law 405/1990), due by **27 December**. You choose the method in Tax configuration: **historical** (88% of last year's final-period liability), **forecast** (88% of what you estimate), **analytical** (100% of the special settlement as at 20 December) or **none**. Below **€103.29** the advance is not due. With the historical method, if last year's final period isn't closed in KoreLab, the base isn't there and the page says so rather than inventing a figure.

The notices: read them before trusting the total

The **Worth knowing** block flags what the calculation does not decide on its own. The most important ones:

- Invoices from history imported from other software that fall in the period: they are not counted, because the VAT register only holds documents issued by KoreLab. In the quarter that straddles the switchover this means the output VAT here is lower than the real figure: add them by hand or ask your accountant.
- Split payment: the taxable amount is there, the tax is not — the public-sector customer pays it, not you.
- Deferred VAT liability: deferred-liability invoices enter the period in which you collect them, not the one in which you issue them. If no payments are recorded, their VAT stays out and the notice tells you. Under the cash-basis scheme, though, after one year from the transaction the tax becomes due even if you haven't been paid.
- Cash-basis VAT on purchases: sales mature on collection, but purchases are deducted at their registration date. If you have unpaid purchase invoices, the deduction must be postponed by hand.
- Pro-rata: it is already written into each invoice's deductibility when you record it, so it is not applied a second time here. Only invoices recorded before you set it need checking by hand.

Notices in the Alerts centre

In the days before the deadline the reminders appear: **settlement to calculate or still a draft** and, once the period is closed and there is an amount, **VAT to pay with F24** with the tax code. In December the advance reminder is added. If you never saved anything for a period and the deadline has passed, KoreLab **stays quiet**: people who settle with their accountant outside the app shouldn't get a notice that doesn't concern them.

The periodic communication (LIPE)

Below the calculation there is the **Periodic settlements communication (LIPE)** card: the communication filed with the Revenue Agency after each quarter (art. 21-bis, Decree-Law 78/2010), which KoreLab fills in **from this settlement** — not from a second tally of the documents.

The card shows **section VP** box by box, the same fourteen boxes as the official form, and produces up to three files:

- PDF summary — the sheet to hand to your accountant or keep on file.
- Data extract (CSV) — the VP boxes as a table, for re-keying into other software.
- XML file — the official file (IVP18 supply) to upload to Entratel/Desktop Telematico. Signing and filing happen outside KoreLab.

Which of the three the button produces is set in **Settings > Company profile > Tax configuration > LIPE output**; the three individual buttons stay available for one-off needs.

The checks before filing

KoreLab applies the Revenue Agency's **blocking checks** — the rules that get a file rejected — and if something is wrong it says so **first**, in red, above the section: the XML button stays off. A file that gets rejected is worse than no file, because it looks like the job is done and you find out after the deadline. If you know what you are doing, "Download the XML anyway" is there.

The data you enter once

The front page needs things that live nowhere else in KoreLab: the **declarant's tax code** and the **role code** (mandatory for anyone other than an individual) and, if your accountant files, their tax code, the **undertaking to file** and its **date**. Set them once in **Settings > Company profile > Tax configuration > LIPE communication**, together with group VAT settlement and the subcontracting box if they apply.

The three boxes KoreLab cannot know

The card asks you for these, because they do not come from the registers: **VP9**(previous year credit, which comes from the annual return), **VP10**(EU vehicle payments on the F24 "identifying elements" form) and **VP11**(tax credits used to offset). Leave them empty if they do not apply.

The two things that catch you out

- In the year's first periodthe credit coming from December / the fourth quarter does notgo in box VP8: it passes through the annual return and is reported in VP9, for the share that return brings into deduction. KoreLab leaves VP8 empty and tells you.
- In the fourth quarter for quarterly-by-option taxpayersthe communication is still filed, with "5" in the Quarter box, but boxes VP11, VP12 and VP14 stay empty: that quarter is paid with the annual return balance, 1% interest included.

What this page does not do

It does not fill in or file the **F24**, it does not sign or transmit the LIPE (the XML file is uploaded to Entratel/Desktop Telematico) and it does not produce the **annual VAT return**. It also does not cover **group VAT settlement**(art. 73): in that case the card says so and the file must be completed by your accountant. **Separate sets of books**(art. 36) are covered instead: declare them under Settings > Company. Watch out for something that is easily assumed: the communication does **not** carry one module per activity. The instructions require **a single VP module summarising all the activities** for the month or quarter concerned, so KoreLab adds them up. Separate modules remain only when the settlements differ — say one monthly activity and one quarterly: there you get two modules because there are two periods, not because there are two activities.

Separate activities, points of sale, VAT numbers: three different things

This is the most common mix-up, and getting it wrong means keeping registers you don't need, or failing to keep ones you do. The question that tells them apart is not **where** you work, it is **what trade you carry on**: *if I closed one of the two, would the kind of work I do change, or only where I do it?*

- Two VAT numbers — two distinct taxable persons: two returns, two settlements, two of everything. Art. 36 has nothing to do with it, and in KoreLab they are two separate accounts.
- Two separate activities (art. 36) — one single VAT number and two different trades, in practice two ATECO codes: for example you produce food and run a farm holiday business. Distinct registers, distinct settlements. This is what you declare under Settings > Company.
- Two points of sale — the same activity carried on in two places: two shops selling your products share the same ATECO code and one single register. Those are the business locations, used for the certified till serial number and to extract one location's takings.

Place and activity are independent: you can have **one** activity in ten locations, or **ten** activities in a single location — a workshop and a restaurant in the same building are two separate activities, even though the address is one.

If your case is simply «I have two shops», this feature is not for you: what you need is business locations.

The exemption from formalities for exempt transactions(art. 36-bis) **is** handled. You switch it on in **Settings > Company profile > Tax configuration**, next to the pro-rata, stating the **year it starts from**: from then on the VAT on purchases and imports is not deducted — under that scheme it is not allowed — so the input VAT of every settlement and box **VP5**come out at zero, even on invoices that show it. Box **VP3**stays filled: purchases are still recorded. Settlements for years **before**the starting year do not change by a cent.

What KoreLab does **not**do is tell the Revenue Agency: the option is declared in the **annual VAT return**(or in the notice of commencement of activity), which this page does not produce. And the option binds you for at least **three years**: the notice next to the checkbox tells you which year a revocation can take effect from.

Plan notes

- VAT settlement is a Businessplan feature and is currently in private testing, like the whole Administration group.

Received invoices (purchase cycle)

The **Purchases**view (inside **Administration > Invoices**, **Sales | Purchases**switch) manages the invoices **received**from suppliers: those sent via SdI **arrive on their own**, the others you import from the XML or P7M file; you register them with the purchase ledger **protocol**number and match them to goods arrivals and supplier orders. The purchase invoice never touches the warehouse: it serves administrative control and the payments schedule.

Invoices arrive on their own (SdI)

- The electronic invoices your suppliers send to your recipient code appear automaticallyamong Purchases, complete with lines, amounts and due dates read from the original XML file (which stays attached to the document). A periodic check also recovers any invoices missed during a channel outage.
- If an incoming document shows "Incomplete data", press Complete from XMLto re-read the original file.
- The return copies of your ownintegrations and self-invoices (TD16-19), which SdI also delivers to the issuer, are recognized with the "Own self-invoice"label and archived automatically: they are not purchases and are never registered.

The three tanks

Purchases are split into **New**(to complete or register — the counter also appears on the Sales | Purchases switch), **Registered**and **Archived**. With **Archive**you remove from New a document you won't register (e.g. a courtesy copy, a document outside your scope); with **Back to New**you bring it back into processing.

Filtering by period and supplier

Above the list of each tank you find the filter bar: free search, the **Year**and **Month**dropdowns (only the values present in that tank) and the **supplier**dropdown to isolate a single supplier's documents — they combine together and the **clear filters**button resets them.

Migration from another software (bulk import)

If you're switching from another program, you don't need to load invoices one by one: in the **Bulk migration (multiple files or ZIP)**card — in **Administration > Invoicing**(one single address for both sales and purchases: the import recognizes each document's direction) — you drag the **ZIP folder**exported from the old software — or select several XML/P7M files together — including the **SdI receipts**. KoreLab recognizes each document's direction on its own:

- the invoices you receivedenter Purchases (like the single import);
- the invoices you issuedgo into a consultation-only archive(Invoices > Sales, «Imported archive» box): they stay readable but are never renumbered, never re-sent to SdI and never enter KoreLab's VAT ledgers. The payment due datesread from the files do feed Receivables & payments, though: the historical collections are handled there, in bulk too (see «Historical documents» below). As with Purchases, KoreLab links each invoice to the right customer on its ownwhen the VAT number matches one already on file; for weaker matches you find Link next to it, and if the customer isn't there yet + Create customer adds it already filled in from the invoice (or Reactivate and link if it's archived);
- self-invoices/integrations(TD16-19) are archived with the «Own self-invoice» label.

Duplicatesare skipped thanks to the IdentificativoSdI read from the receipts (`_MT_`/`_RC_`): you can re-run the same import without creating duplicates. Into the same panel you can also drop the invoice and payment **PDFs**: they attach themselves to the right document (by supplier number, original number or name + date read from the file name) and, if you re-load files **already attached**in a previous import, they are recognized and **skipped**instead of being attached a second time — so you can re-drag the whole folder without creating duplicates. At the end a **summary**shows how many invoices were imported by type, how many were already present, how many attachments were linked, how many were already present and which are left to link by hand, and — under «files not imported» — any rejects with the reason (e.g. not a FatturaPA invoice, unrecognizable direction). For the direction to work, first fill in **VAT number and Tax code**in the Company profile.

Numbering: which number KoreLab restarts from

If you have already issued documents this year with your old software, tell KoreLab **before you issue the first document**: on the same **Administration > Invoicing**page, next to the bulk migration, the card **Numbering — start from a number**shows two values for each document type (invoices, delivery notes, receipts, purchase protocol, reverse charge, orders): the **last assigned**by KoreLab and the **highest already present**among your documents. Type the number you want the **next**document to carry into **Start from**and press **Set**; next to it you see a preview of how it will actually come out (e.g. `0025/2026`).

The starting number can **only be raised**: lowering it would put numbers already used back into circulation, and a second document with the same number is a duplicate that cannot be fixed afterwards — that number has already gone out on the XML sent to SdI. For the same reason KoreLab **refuses**a start that collides with an existing document, telling you the highest number it found.

Two things to know: the counter for **SdI file names**cannot be set or reset (those names cannot be repeated); and for **orders**the check is on the counter only, because those coming from sales channels carry the channel's own number, in a format that cannot be compared.

Historical documents: the past stays alive

The **Historical documents**checkbox on the card (on by default) tells KoreLab the files are the **past already accounted for**in the old software. Received invoices enter with the **HISTORICAL**label directly among the **Registered**— no New tank and **no new protocol number**: the past's VAT ledger stays in the old system — and appear in **Receivables & payments**with the due dates read from the files, ready to be paid or closed in bulk with **Mark as settled**(see the Receivables & payments section). Archived issued invoices behave the same way on the collections side. If a document wasn't historical, open it and press **Not historical — back to New**to run it through the normal flow (registration with the protocol, and the TD16-19 integration if foreign). Untick the checkbox only when bulk-loading **current**invoices still to be registered.

Invoices that don't go through SdI: the manual document

For **foreign**invoices (PDF or paper, foreign currency too), receipts for foreign services (e.g. software subscriptions) and reverse-charge documents to enter by hand, use the **New supplier invoice (manual)**card: press **+ Enter manually**and fill in the form.

- Supplier: pick from your records (fields pre-fill) or type the company name, country (2-letter code or name), VAT identifier and address. For EUsuppliers the VAT identifier is required for the subsequent TD18 integration; for non-EUones it may be missing (the XML will use the conventional filler code).
- VAT summary: one row per rate with the taxable amount — the quickest way (detail lines aren't needed). For exempt or reverse-charge portions use the naturecode (e.g. N6.9) instead of the rate.
- Currency: if the invoice isn't in euro, choose the currency and enter the exchange rateat the date of the transaction: amounts are stored in EURand the original currency figures stay noted on the document.
- Due datesand the original's PDF attachment(kept in the dossier) are optional.

Once saved, the flow is the same as the import: if the document is **foreign or reverse charge**, registration stays blocked until you generate and transmit the **TD16-19 integration**from the detail; otherwise you register it right away with the protocol.

How to: import a supplier invoice

- Open Administration > Invoicingand press Open on the Bulk migrationcard.
- Choose the received file — a single XML/P7M works too, you don't need a ZIP (max 10 MB).
- KoreLab reads the document and saves it in the Importedstatus. If it resembles a document already present (same supplier, number, amount), it asks for confirmation before importing; exact duplicates are refused.
- The original file is uploaded and stays attachedto the document (dossier preservation).

How to: register with the protocol

- Open the imported document: next to the register button there is the Registration datefield, preset to today.
- If the invoice belongs to the previous period, change the date beforeregistering: the recording date (art. 25 Presidential Decree 633/72) decides which VAT settlement the deduction falls into, and it cannot be corrected afterwards. Example: invoices received between 28 and 31 August and processed on 2 September must be dated 31 August, otherwise the deduction slips by one period.

- Press OK Register (protocol).
- The document receives the purchase ledger's progressive protocolnumber, assigned per year of registration(not the document's year) — the art. 19 rule for VAT deduction. The chosen date stays next to the protocol and in the Registered oncolumn of the table view.
- Once registered you can Mark verified(check completed) or Disputeit (and later Reopen).

Registration date rules

The protocol is a per-year progressive assigned **in registration order**: to keep the ledger in chronological order, KoreLab rejects — telling you why — a date **in the future**, a date **earlier than the document's date**, and a date **earlier than the last document already given a protocol in the same year and in the same ledger**. Rule of thumb: register the oldest documents first. When a registration is rejected **no protocol number is consumed**.

More than one ledger: separate books (art. 36)

If under **Settings > Company**you declared **two or more separate activities**, the purchase ledger is no longer a single one: each activity has **its own**ledger, and the protocol runs **inside each of them**. Two documents belonging to different activities can therefore carry the same number — that is correct, they sit in two different ledgers.

- On the document, next to VAT deductibility, pick the activity. If you do not, the document is counted into the firstdeclared activity, and the VAT settlement page tells you how many are unassigned.
- The activity can be changed until the document is registered. After that the field locks and tells you why: that protocol belongs to the ledger of that activity, and moving it would place it in a ledger where the same number already belongs to another document.
- If you turn separate books on mid-year, the documents already given a protocol do not move: the first activity's ledger includes them, and the next protocol restarts from the highest number already usedinstead of from 1 — so the printed ledger never shows the same number twice.
- If you have a single activity, or none, none of this appears: the numbering stays exactly as it always was.

Printing and exporting a single ledger

Above the list of received invoices, next to the **VAT register**(CSV) and **Print register**(PDF) buttons, you get the **Register to export**dropdown: pick **All activities**for the usual sheet, or a single activity to get **its ledger only**. The choice applies to both formats, and the file name carries it, so two ledgers for the same month do not overwrite each other in your downloads folder.

At the top of a single ledger's PDF there is a box that **declares** it: it names the activity, cites art. 36 and warns that the other activities have their own registers, each with an independent protocol sequence — so whoever receives it does not try to reconcile those totals with the whole business.

A single activity's register is **download only**: you cannot declare it handed over. The hand-over — the one that locks the period and prevents recording or correcting within those dates — is declared on the **whole register**, which protects the dates of every activity at once.

What happens and what to check

- The detail shows lines, VAT summaries, any withholdings with the net payable, the stamp duty and the due datesstated by the supplier (they feed the Payments schedule).
- Set the document's VAT deductibility(preset percentages) for the ledger.
- Supplier in records: if the document's VAT numbermatches a supplier already on file, KoreLab links it on its ownwithout asking for confirmation (the VAT number is a certain tax identity); weaker matches — by tax codeor by name— still need a manual Confirm. If the supplier isn't there yet, the + Create supplier from this documentbutton creates it already filled in (company name, VAT number, tax code and address taken from the invoice) and links it right away. If the VAT number matches an archivedsupplier, KoreLab doesn't silently reactivate it: it proposes Reactivate and link.
- Candidate goods arrivals: raw material lots that arrived with compatible DDTs are proposed — tick them to link the invoice to the arrivals.
- Supplier order (price comparison): link the order to see, line by line, the invoiced price against the expected one, with deltas highlighted; remember matchmemorizes the supplier's article code for future imports.
- Any warnings (unverified p7m signature, summaries that don't add up) appear at the top of the detail.

- Supplier attachments: if the electronic invoice contains attachments (delivery notes, details, PDFs), they appear in the detail with a download button — extracted on the fly from the original XML file.

Foreign invoices and reverse charge: the TD16-19 (and TD28) integration

If the document is **foreign or in reverse charge**(orange label), registration is **blocked**until you transmit the integration: the document detail shows the **Reverse charge integration required**box — choose the type (TD16 domestic, TD17 foreign services, TD18 EU goods, TD19 goods already in Italy, **TD28**for purchases from **San Marino with VAT**already charged on the invoice), check the date and the VAT rate per taxable amount, press **Generate integration**and then **Send integration to SdI**(deadline: the 15th of the following month). Once sent successfully, the document becomes registrable with the protocol.

- KoreLab proposestype and date on its own: TD28 for San Marino with VAT; TD19when the foreign invoice references DDTs (the goods were already delivered in Italy); the datefollows the tax rule (TD16 = receipt date; TD17-19 = transaction date for non-EU, receipt date for EU; TD28 = document date). Everything stays editable.
- For TD28 the proposed rate is the one already chargedby the San Marino supplier: it is a communication, not a tax integration.
- Original attachment: for TD17/18/19/28, if the document has the supplier's file (XML or PDF), the Attach the supplier's original document to the XMLcheckbox (on by default) includes it in the transmission — useful in case of audits (Circ. 26/E). If the file exceeds the size limit, the submission goes out without the attachment and warns you.

Invoice never received: the TD29 communication

If a supplier **never issued you an invoice**(or issued an irregular one), you have **90 days**from the issuing deadline to report it to the Revenue Agency and avoid the penalty on your side: **Invoice never received (TD29 communication)**card > **Report to SdI**. Enter the supplier (VAT number required), transaction date, taxable amount and rate, press **Generate TD29 communication**and then **Send**. The communication **does not grant any VAT deduction**: it only keeps you compliant.

To send to SdI: if a TD16-19/28 integration or a TD29 notice was **generated but never transmitted**(its number is already reserved), a dedicated list appears in Purchases with the legal deadline next to each item (red if overdue) and a button to send it right away — in addition to the Alert Center notice. During **bulk migration**, imported self-invoices attach themselves to their original foreign invoice (via the file's 'linked documents' references): the foreign document counts as already integrated and can be registered with its protocol number without regenerating anything.

Every attachment in one place: the Documents view

Next to **Sales**and **Purchases**there is a third view, **Documents**: the archive of every file attached to an accounting document — **invoice PDFs**, the **original XML/P7M**of e-invoices and **payment receipts**. The chips at the top filter by type (supplier invoice, issued invoice, payment receipt) and the search box looks both at the file name and at the document it belongs to (the supplier's name, for instance). **Open**shows the file **inside the app**: PDFs page by page with zoom, e-invoice XML as text; for any other format **Download**and **Open in new tab**are always there.

It is **read-only**: an attachment is uploaded and removed from the document it belongs to (the invoice detail in Purchases, or the payment in Collections & payments), because a file detached from its document would be an orphan. Those same attachments **no longer appear**in the Quality documents archive, which is back to holding training certificates, technical data sheets and FCM only.

Special cases

- Only importeddocuments can be deleted: once registered the protocol is assigned and the document stays.
- Simplifiedinvoices (a different format) cannot be imported yet: register them with your accountant.
- Import and registration require the cloud.

Correcting the due dates of a received document

On the document card (press the card to open it) there is an **Edit due dates** button: add, remove or correct the rows (date + amount) and press **Save due dates**. Use it when the supplier did not state them in the file — meanwhile the schedule proposes an **estimate**, flagged as such — or when the stated ones are wrong. KoreLab **flags** it when the instalments fall outside what the document actually asks you to **pay**: above the plausible maximum (the total, plus the items stated in the file that raise it — **recharged stamp duty**, for one) or below the minimum (the total net of the **withholdings** stated in the file). It is a range rather than a single figure because what an invoice asks you to pay is not something the file states with certainty: the document total is optional and is not validated by SdI, and items such as stamp duty, withholding tax, a professional-fund contribution or a rounding move it. A lower sum can be perfectly correct — a deposit already paid, or **split payment**, where the supplier is paid the taxable amount only: the schedule will show exactly what you enter.

The warning **does not stop you saving**. Registering a received invoice has a statutory deadline, and with it the right to deduct VAT: a figure the product cannot compute with certainty must not be able to hold that up. Saving stops for one reason only — a row with a **zero or negative amount**, which would drop out of the schedule and take the debt with it. A row with **no date** is allowed: it is the same state KoreLab itself produces when the supplier states neither a date nor payment terms, and the document card shows that instalment as one whose date is still to be defined. Hand-written due dates are **kept**even if you re-read the file with **Complete from XML**, and in the schedule they carry the **manual**tag, so they can be told apart from the supplier's own. To put the file's dates back there is **Restore from file**: it re-reads the attached XML document and brings the supplier's dates back into the list, which you then save (it only appears while the file is still attached to the document). If instead you **empty**the list on a document that did state its due dates, KoreLab asks for confirmation: with no rows the document goes back to having no stated due dates and the schedule proposes an **estimate**. The change affects only the payment schedule: the document's amounts, lines and VAT remain the snapshot of the file received.

Plan notes

- Like the whole invoicing suite: Businessplan, currently in private testing.

Linking the invoice to packaging arrivals

In a received invoice's detail, **Candidate goods arrivals** proposes both **raw-material** and **packaging** lots when DDT, date and supplier are compatible. Every row states its type and the two sets stay separate: tick only the arrivals actually documented by the invoice. Linking adds traceability metadata in both directions; it **never changes stock, quantities or the append-only movement ledger**. Unticking removes the link; deleting an invoice that is still imported automatically unlinks both lot types so no dangling reference remains.

ADMINISTRATION

Receivables & payments (schedule)

The **Receivables & payments**page (Administration menu) records the **collections**of sales invoices and the **payments**of supplier invoices, and keeps the **schedule**of not-yet-covered installments. The key principle: the document status (To collect / Partial / Settled) is **always derived**from the recorded movements — it is never set by hand, it updates by itself.

The page has five views: **Schedule**, **Collections**, **Payments**, **Credit notes**(the TD04s you issued, to offset against a customer's document or refund) and **Supplier credit notes**(credit notes you received from your suppliers, which reduce what you owe them: offset against an open purchase invoice from the same supplier, or record the refund received). Each has the **Export view**button to download the current ledger as CSV.

In **all five views**(Schedule, Collections, Payments, Credit notes and Supplier credit notes), above the list you find the filter bar: free search and the **Year**and **Month**dropdowns (only the values present); on Collections, Payments, Credit notes and Supplier credit notes there's also the **customer/supplier**dropdown (the Schedule mixes collections and payments, so it only has period + search). They combine together and the **clear filters**button resets them.

Schedule

- It lists the uncoveredinstallments: those of issued sales invoices (from the payment terms), the due dates of registered supplier invoices and the installments of historical documentsimported with the migration («historical» label, due dates read from the XML files).
- Each row shows date, type (COLLECTION/PAYMENT), document, method and outstanding amount; overdue installments are highlighted in red and counted at the top.
- If Google Calendar is connected and the Calendar channel is active for the "Administration — receivables & payments" category (Settings > Notifications), a appears next to each installment: one click creates the calendar event.

How to: send a payment reminder

- In the Schedule, tick the collectioninstallments to chase (even across different invoices: one email per documentgoes out, with all its selected installments).
- Press Prepare reminders: the panel opens with the text template— pick it from your saved texts (the "Email to customer" group of Preset texts) or write it on the spot; the variables {cliente} {numero} {data} {importo} {rate} are substituted per document (the preview at the bottom shows the first one).
- Check the recipient email, proposed from the Customers records (editable per row: without a valid email that document is skipped).
- Leave Attach the invoice PDFticked (recommended) and press OK Send.
- The outcome is shown per document; every chased installment keeps its annotation(icon with the send counter and the date of the last one, visible in the schedule).

- The sender is your company «(via KoreLab)» with replies going to your email; if you configured your own SMTP mailbox in Settings > Email sending, the email leaves directly from there (and on failure it automatically falls back to the KoreLab channel, warning you).
- Reminders are manual only: KoreLab never writes to your customers on its own.

How to: record a collection (or a payment)

- Open the Collectionsview (issued sales invoices and imported historical ones; TD05 debit notes are collected like invoices) or Payments(registered/verified supplier invoices and imported historical ones).
- Click the document to open it: you see the movements already recorded and the entry form.
- Fill in date, amount(proposed = outstanding), payment method (FatturaPA MP codes), bank and notes, then press OK Record collection(or OK Record payment).
- The document status updates by itself: Partialif an amount remains, Settled/Paidonce the due amount is covered.

- A negative amountrecords a reversal/refund.
- A movement can be deletedwith the (a cash movement is not a tax document): the status is recalculated.

Mark as settled: closing the past in bulk

After a **migration**from another software, most historical documents are actually already paid or collected. In the Collections and Payments views, when there are **open historical documents**, a dedicated bar appears at the top: tick the documents that are already closed (or **select all**), choose the **settlement date**and press **OK Mark as settled**— for each one a movement equal to the outstanding amount is recorded with the «Migration settlement» note. Unselected documents stay open in the schedule as real receivables/payables. Every movement created is a normal cash movement: if you make a mistake, delete it with the and the status recalculates.

Credit notes (TD04): offsetting and refund

An issued TD04 is a **debt towards the customer**: it is not "collected", it is extinguished. In the **Credit notes**view each open credit note offers two paths:

- Offset against an open document— choose an unsettled document of the same customer(the original invoice is proposed first), enter date and amount (the maximum offsettable is proposed) and press OK Offset: a single entry reduces both the credit note's and the document's outstanding amount. Cross-invoiceoffsetting (against a document other than the origin) is also allowed, as long as the customer is the same.
- Refund the customer— record an outgoingcash movement on the credit note itself (date, amount, method, bank).

- The offset date cannot precede the credit note and the amount cannot exceed the outstanding balances.
- An offset or refund can be deleted with the : note and document reopen.
- If by mistake the credit ends up over-offset, a red warning shows the excess amount: delete the extra entry.
- Offsets block the cancellation of the involved documents: first delete the allocations, then cancel.

Special cases

- The collections ledger lives on the cloud: offline the page is read-only and entries are disabled.
- Installments overdue or due within 7 days feed the Alerts center ("Administration — receivables & payments" category): menu badge, dashboard and — if enabled — push, email and calendar.

Plan notes

- Like the whole invoicing suite: Businessplan, currently in private testing.

Agent commissions

The **Agent commissions**page (Administration menu) computes and settles your sales agents' commissions based on issued invoices and on how much has been **collected**. It has four views: **Agents**, **Accrued**, **Settlements**and **Settings**.

Agents (records)

- In the Agentsview fill in name (required), email, phone and the default Commission %, then press + Add.
- Fields are edited directly in the row; the activecheckbox deactivates the agent without deleting them.
- An agent is never deleted(historical invoices reference them): you deactivate them, and they remain readable in Accrued and in past settlements.
- An agent without a percentage accrues no commissions until you assign one.

Where the commission comes from

- The rate resolves in steps, from the most specific to the most general: what you write on the documentbeats everything; then the customer's % override; then the sales-line rate(the grid on the agent); finally the agent's default Commission %. The first level that has a value wins — they never add up.
- On the agent's card, Rate per sales line: one box for each active sales price list. It is what you need when the same agent works across several lines under different agreements — typically one rate for large retail and another for wholesale and resale. The rate is picked from the customer's price listwhen the draft is created. Empty is not zero: an empty box means "no rate on this line" and the agent default applies; a 0means that line really pays nothing.
- On the Customersrecords you can assign the agent and an override %for that customer.
- On the invoice draft the Agentand Commission %fields come pre-filled from the customer (customer override, otherwise agent default) and stay editable until issue.
- On issue the percentage is frozen: later changes to the records do not touch already issued invoices.
- The TD04 credit note does not accrue on its own: it reducesthe original invoice's base.

Accrued

The **Accrued**view lists commissionable invoices with: calculation base, %, **accrued**amount, **collected**share, what is **settleable now**and what has **already been settled**. The agent filter and the totals at the top give the overview.

How to: settle an agent

- Open the Settlementsview, choose the agent and optionally the From/Toperiod (it only filters which invoices to consider), then press Compute.
- The preview shows, document by document, the Deltato settle: accrued × collected share - already settled. The delta modelguarantees no euro is ever settled twice, even recomputing several times or changing the period.
- Press Save draft: the settlement stays a draft (deletable).
- Press Settleto make it final: the amounts stay frozen forever(settled settlements are immutable). From then on Print PDFis available for the statement to hand to the agent.
- If credit notes or reversals arrive after the settlement, the accrued amount drops: the nextsettlement will contain a negative recoverydelta — nothing to fix by hand.

Settings

- Proportional to collections(recommended): the commission is released as the invoice gets collected.
- All on balance: it is released only when the invoice is 100% settled.
- Changing the mode only affects future settlements: settled ones stay frozen.

How and when the agent gets paid

On the agent's card, next to how much they earn, there is now **how and when**: the **IBAN**and **BIC**for the transfer, how often you **settle**(month, quarter, year) and in how many **days you pay**after the settlement.

The default is **quarterly**because the law says so: commissions are settled by the last day of the month following the quarter in which they accrued (**art. 1749 of the Italian Civil Code**). It is a **default you can override**— the agency contract may agree a different cadence — so the field is editable; but if you touch nothing you get what the law provides.

The payment days stay empty until you state them, on purpose: if no term was agreed, KoreLab will not invent one and will never tell you that you are late against a deadline nobody ever accepted. The "to pay" alert still appears, just without the accusation.

Commission alerts

In the **Alert centre**(Settings > Notifications) there is the **Administration — agent commissions**category, which brings three things to the dashboard, and only when they matter:

- Closed period to settle— it appears a week before the deadline and turns into a delay once the deadline passes. The currentquarter is never requested: you settle what has ended.
- Settlement to pay— until you declare the payment with Mark as paidon the closed settlement.
- Missing IBAN— not a generic "complete the record", which would be noise forever: it appears only when there really is a settlement to pay and no IBAN on file.

Mark as paidis declared **once**and cannot be undone: the date stays, and the database itself refuses to clear it. It is the same protection that makes a closed settlement immutable.

9The category offers all four channels — in app, push, email and calendar — but **push and email start switched off**: a quarterly deadline should not wake anyone who did not ask for it. You turn them on in the Alert centre, and from then on they come from the daily check. On the calendar you create the event yourself with the **Calendar** button on the settlement, and only when an agreed payment term exists: a derived date, outside the app, would read as an agreed one.

Bonus on period targets

On the agent's card you can declare one or more **tiers**: "over €150,000 a year, +2%". For each one you set the **threshold**, the extra **percentage points**, **how it applies**and the **period**(year, quarter or month).

The two modes are not the same thing, and the difference is worth thousands of euro:

- On the excess only— the bonus applies to what exceeds the threshold, in progressive bandslike tax brackets: with 1% over 100,000 and 2% over 150,000, on sales of 175,000 the agent gets 1% of the first band's 50,000 plus 2% of the second band's 25,000. Crossing a threshold can nevermake the bonus go down.
- On the whole base— once the threshold is passed, the percentage applies to allthe period's sales. Here tiers do not add up: the highest one reached applies. If a higher tier accidentally carries a lowerpercentage than the one below it, KoreLab flags it: the bonus would collapse the moment the threshold is crossed.

The bonus is not written on the invoice, and that is not an oversight: when an invoice is issued nobody yet knows whether the year's threshold will be passed, and by the time it is, that invoice is already frozen. The bonus is therefore computed **at settlement time**, over the whole period, and appears as its own row in the preview — with the reason next to it (period, threshold, how it applies).

The threshold is measured on the **same commissionable base**as the invoices (taxable amount net of discounts), over the **whole period**and not over the settlement's From/To window: settling in September does not reset January's sales. The bonus follows the same collection rule as everything else, and like everything else it enters the delta model — if a credit note brings sales back **below**the threshold after the bonus has been paid, the next settlement shows a negative **recovery**.

Plan notes

- Like the whole invoicing suite: Businessplan, currently in private testing.

Banks and payment terms

The **Banks**and **Payment terms**pages (Administration menu) are the invoicing settings: your company's bank accounts and the payment types proposed on the invoice draft to generate the due dates.

Banks — the seller's accounts

- Open Administration > Banks.
- Press + Add bankand fill in bank name, IBAN(normalized to uppercase without spaces) and BIC (optional).
- Mark one bank as defaultwith the radio button: its IBAN is proposed on the invoice's payment block (bank transfer/RiBa) and printed in the courtesy PDF.
- The removes a row. Saving is immediate on every change.

Payment terms — the payment types (method + installments)

- Open Administration > Invoicingand press Open on the Paymentscard.
- If the list is empty, Load the most commoninserts the standard types (bank transfer, RiBa, cash…); otherwise + Newcreates a type from scratch.
- For each type you set: the name(the one you will see in the invoice menu), the MP methodper the FatturaPA coding (MP01 cash, MP05 bank transfer, MP12 RiBa…), and the installments.
- Each installment has: the daysfrom the document date, the E.O.M.checkbox (end of month: the term is added and then the date moves to the end of the resulting month — e.g. an invoice dated 05/01 with "30 days E.O.M." falls due on 28/02) and an optional %(the installment's share; empty on all = equal parts).
- With + installmentyou add installments (e.g. 30/60/90 days). If the percentages don't add up to 100, or are set only on some installments, a warning appears to fix.
- The defaultradio marks the type to use when nothing states how payment happens: it serves purchase invoices whose XML does not declare the payment data(it is not a mandatory field, and not every supplier fills it in) and whose supplier has no type of its own on file. KoreLab marks nothing for you; if however you pressed Load the most commonin an earlier version, you may find the bank transfer already marked— back then the radio did nothing, now it does. Check it is the one you want: No defaultclears it, and the card flags it to you. Without a default, those documents keep a single due date on the invoice date.

The default is a **lens**, not a setting that applies from now on: it also applies to purchase invoices **already recorded**that do not state the payment data. Marking it, changing it or clearing it **immediately**moves the estimated due dates of your whole past archive, in and out of the «overdue» state and of the notice window too. The dates the supplier wrote in the file, and those you typed by hand on the document, are never touched. If you had already exported estimated due dates to your calendar, those events stay as they were: the calendar does not realign by itself.

What happens on the invoice

- In the invoice draft, choosing the type in the Pagamento block, KoreLab generates the concrete due dates (dates and amounts) on the total payable; they stay hand-editable and Rigenera scadenze recalculates them. (Those two labels are hardcoded in Italian on that screen.)
- The due dates of issued invoices feed the schedulein Receivables & payments.
- On purchaseinvoices the due date stated in the supplier's file always beats the estimate; the supplier's type and then the default only step in when the file is silent, and the estimate is flagged as such. The estimated date can be corrected on the document card, under Administration > Invoices > Purchases, with the Edit due dates button; the payment method is not a field in that list: change it under Payment terms on the supplier record, or on the default type. If you type the due dates by hand the whole estimate drops, payment method included.
- If you saved no custom types, the standard types are proposed on the invoice anyway.

Plan notes

- Like the whole invoicing suite: Businessplan, currently in private testing.

Amazon — channel accounting

The **Amazon**page (Administration menu) solves the classic marketplace problem: **the payout you receive is not your revenue**. Amazon collects from the end consumer on your behalf, withholds fees and subscription and transfers the difference. If you book the net amount as revenue you understate turnover, lose deductible costs and skip the reverse charge entirely.

KoreLab imports the Seller Central reports, breaks the gross down item by item and closes on the money that actually reached your bank.

Two ways to bring the data in

- File import (always available): download the reports from Seller Central by hand and load them here. No connection, no credentials, no approval needed.
- Automatic sync (the "Sync from Amazon" button): KoreLab asks Amazon for the settlements directly, with nothing to download. It requires the seller's Amazon account to be linked by whoever runs the service — today it is active only for the account linked during private testing. If the button is missing, or answers that this is not the linked account, use the file import instead.

Either way, buyer personal data (name, street, phone) **never enters**KoreLab — the import discards it upstream.

How to: import a report

- In Seller Central open Payments > Report repository, choose report type Transaction, set the date range and generate it. Download the CSV when ready. Alternatively, the All statementstab gives you the Settlement V2 flat file of a single settlement.
- Open Administration > Amazonand pick the file. The format is detected automatically, whether the report is in Italian or in English.
- Re-importing the same file does nothing: the import is identified by its content and never duplicates. To redo a period, delete the import from the list and load it again.

How to: sync without files

The **Sync from Amazon**button pulls the **closed**settlements of the period. Open ones are left out — their amounts are still changing, and an accounting ledger is not built on provisional numbers — but they are still counted in the message, so you know they exist. Settlements already imported are skipped: syncing twice never creates duplicates.

When it finishes, the message says how many settlements came in and, above all, **which ones did not and why**. If a warning appears, read it: it flags the cases where the figures may be incomplete (amounts Amazon sent in an unreadable format, a list too long to be read in one go, movement types KoreLab cannot classify yet).

The reconciliation statement

From the **From**date you choose, the statement separates two levels that Amazon mixes in the same account:

- Economic composition— actual revenue and costs: gross sales, refunds, selling fees, promotional discounts, subscription, advertising, marketplace withheld VAT, adjustments. Their sum is the economic result: what you actually earned.
- Financial movements— money transfers that are neither revenue nor cost: payouts to your bank account and charges to your payment method, which Amazon makes when the balance goes negative (typically the subscription charged with no sales to cover it). That money is your own coming in, not earnings: counting it as revenue would inflate the result.

The two sums together give the **change in the Amazon balance**for the period.

Download PDFproduces the branded statement to hand to your accountant: it starts from the gross, goes down item by item and closes on the bank transfer.

Where the goods actually went, and why it matters

Marketplace sales enter KoreLab with the **marketplace's**country (amazon.it > Italy), not the **delivery**country. As long as distance sales to consumers in other EU countries stay below **€10,000 a year**and you have not opted into OSS, Italian VAT is the correct one and the difference does not produce a wrong tax. But it does make the **count towards the threshold**wrong:

a sale made on amazon.it and shipped to France looks domestic and is not counted. You can cross €10,000 with nothing to flag it — which is exactly the moment the tax starts being due in the buyer's country.

The **Update delivery countries**button asks Amazon for its VAT report and derives, for each order, the country the goods arrived in. From then on the count towards the threshold — the one you see under Invoices, and the one that triggers the alert — is measured on the right country.

KoreLab asks Amazon for the **orders**report for the period — not the VAT one, which would have needed a role with high management costs (**Tax Invoicing (Restricted)**), ruled out for that reason. The report used today needs no extra role, but covers at most **30 days per request**: for a longer period KoreLab splits it into several requests on its own, with nothing for you to do.

From that report KoreLab keeps **only the country code**and whether the buyer had a VAT number (needed for exemption). The buyer's city, postcode and VAT number are **not stored**.

When Amazon settles in another currency

When a settlement is in pounds or any other currency, KoreLab **converts nothing**: it shows the amounts in their own currency and says so. Converting to euro is a tax decision that is yours to make — the rate is the one of the day of the transaction (art. 13 §4 of Italian Presidential Decree 633/72, from 1 January 2027 art. 27 §4 of the Testo Unico IVA) — and the difference against the rate Amazon applied is a foreign-exchange gain or loss to be recorded separately. When a period mixes currencies the totals are not added up: adding pounds to euros would give a number that is neither.

Channel costs against the invoices

A dedicated card compares, month by month, the costs Amazon **withheld**from your balance against the **Amazon invoices**you recorded in KoreLab. It exists to surface the case that is hardest to spot on your own: the invoice that never arrived, or arrived and was never recorded. This card is read-only too.

Settlements

The table rebuilds the payment periods from the report's payment number, showing each period's economic amount next to what reached the bank account. It is the direct cross-check against your bank statement.

Withheld amounts must be recorded: reverse charge

Fees, subscription and advertising are **purchases of services supplied by Amazon EU**: record them as a supplier invoice with a **reverse-charge integration**, to be transmitted by the **15th of the month following**receipt (Italian rules).

Download the invoice from Seller Central (Tax document library) and record it under **Invoices > Purchases > New manual supplier invoice**, then generate the integration. Number, date and amounts must be read **from the invoice**, not from the statement: the statement is a summary, not a tax document.

Daily takings comparison

The last card compares, day by day, Amazon sales against the daily-takings register rows already in KoreLab. Four outcomes:

- Matches— row present and amount identical;
- Not in KoreLab— Amazon sales with no register row: this is expectedwhile Amazon takings still live in the legacy system;
- Amount differsand KoreLab only— the two cases to review, as they flag a possible duplicate entry.

The comparison is **read-only**: it never writes or edits any register row. Any correction is your decision, with your accountant.

Plan notes

- Like all of Administration: Businessplan, currently in private testing.

TOOLS

Quick Search

The **Quick Search** is the first item in the **Tools** menu: it lets you find any KoreLab function or page on the fly, without having to remember which menu it lives in.

How it works

Open **Tools > Search**, type a word into the field and KoreLab shows the list of matching functions. One click on a result takes you straight to the right page.

Search by name or by keyword

You can search either by the function name or by a synonym. For example: *recall* (or *withdrawal*, *incidents*, *crisis*) takes you to the **Records** of the Quality center, home of the Incident/crisis log and the Withdrawal/recall test (mock recall); *traceability* or *lots* take you to **Warehouse**; *right to be forgotten* or *delete account* open **Privacy & GDPR**; *CCP* takes you to the **Critical Control Points**; *suppliers* or *fraud* to the **Assessments**; *calibration* to **Equipment**.

What it shows

The search lists only the functions **available in your plan** and whose modules are active: if an item does not appear, it may not be included in your subscription or it may be turned off in Settings. For now the search helps you **move between the app's functions**; it does not yet search inside the individual data you have entered (products, records, and so on).

Import / Export

The **Import / Export** section brings together, in a single tab, all the tools for moving your data into and out of KoreLab: you can export raw materials, packaging, suppliers, products and bills of materials to Excel and — in the opposite direction — bulk-load the same data starting from pre-filled Excel/CSV templates. You find it in the **Import / Export** tab, divided into three vertical blocks: **Export Data**, **Import Templates** and **Import Data (Bulk)**.

Exporting data to Excel

In the **Export Data** block each data type has its own card with an **Excel** button. The available cards are:

- Raw Materials — exports all ingredients with code, name, unit, default cost, default supplier, minimum stock, notes, producer, origin and EAN; a second sheet, "PRICES PER SUPPLIER", lists the prices for each supplier with the lead time in days and a default indicator (shown as "Yes").
- Packaging — exports the packaging items with code, name, type (Primary/Secondary/Pallet), unit, pieces per unit, default cost, default supplier and the logistic dimensions (L×W×H in mm and own weight; for pallets also the maximum height and maximum load weight).
- Products (price list) — exports the price list with calculated costs and prices (raw material cost, labor, batch cost, CPF, wholesale and retail price). It is a price-list snapshot, not meant to be re-imported.
- Products (re-import) — exports the products complete with ingredients, packaging and logistic data (customs code, country of origin, gross weight and the outer cases/pallet configuration for palletization), in a format suitable for reloading.
- Recipes — exports the bills of materials (recipes) with their ingredients; these too can be reused for import.

For **Suppliers** there is a dedicated card with three filters — **All**, **Mat.** and **Pack** — that choose whether to export all suppliers, only raw material suppliers or only packaging suppliers; then press **Excel**.

Step by step (export)

- Open the Import / Export tab.
- In the Export Data block find the card for the data you need (e.g. Raw Materials).
- For suppliers, first choose the All, Mat. or Pack filter.
- Press the card's Excel button.
- The Excel file is generated and downloaded automatically by the browser; the file name includes today's date (e.g. KoreLab_MateriePrime_2026-06-17.xlsx).

Downloading a pre-filled template

To bulk-load data you must start from the right template. In the **Import Templates** block you find the download buttons: **Raw Materials**, **Packaging**, **Suppliers**, **Products** and **Recipes**. Each template is an Excel file that contains, in the first rows, the INSTRUCTIONS, then the column header, a few pre-filled example rows and a final row reading "(add your rows below)".

Columns marked with an asterisk (*) in the header are required. Examples:

- Raw Materials: nome (name), unità (unit) and costo_default_eur (default cost) are required. There are also optional columns for notes, default supplier, supplier cost, allergens, nutritional values (energia_kcal, fats, saturated fats, carbohydrates, sugars, fibre, protein, salt), minimum stock, produttore (producer), origine (origin) and ean.
- Packaging: nome (name), tipo (type), unità (unit) and costo_eur (cost) are required. The type must be written as "primary" (jars, labels, bags), "secondary" (boxes, crates) or "pallet" (pallets/skids); pezzi_per_unità (pieces per unit) applies only to secondary items. The optional columns dim_l_mm, dim_w_mm, dim_h_mm and peso_kg hold the outer dimensions in mm and the empty weight (for palletization); max_altezza_mm and max_peso_kg apply to pallets only.
- Suppliers: nome (name), mat_prime and packaging are required. The mat_prime and packaging columns must be filled in with SI/NO (yes/no); delivery days are separated with commas (e.g. Lun,Mar,Mer for Mon, Tue, Wed).

Step by step (import)

- In the Import Templates block press the button for the template you need (e.g. Raw Materials) and open the downloaded file.
- Fill in the columns, respecting the required ones marked with an asterisk; you can delete or overwrite the example rows and add yours below them.
- Save the file in Excel (.xlsx, .xls) or CSV (.csv) format.
- Scroll down to the Import Data (Bulk) block and choose the data type to import by pressing one of the buttons: Raw Materials, Packaging, Suppliers, Products or Bills of materials.
- Press Select Excel/CSV file and choose your completed file.
- Check the preview: the heading Preview: N rows appears with the first 20 rows read from the file (if there are more, at the bottom you see "...and N more records").
- If everything looks right press Confirm Import. While loading, the button shows Importing…. To back out, press Cancel.

What happens

- KoreLab automatically reads the first sheet of the file and locates the header by looking for the row that contains "nome": instruction rows, headers and rows with the asterisk are ignored, so you don't accidentally import the template notes.
- In the preview every row is numbered and shows the key fields. For raw materials the name, unit, cost, supplier and allergens are shown; numbers written with a decimal comma are interpreted correctly.
- For Products and Bills of materials the preview shows how many ingredients (and, for products, how many packaging items) have been "resolved" (e.g. "3/4 ing. resolved"): that is the number of names exactly matching raw materials or packaging already present in KoreLab. Names that don't match are kept as custom entries.
- If the header cannot be found, the error "Header not found. Use the downloadable template." appears in a red warning box. If no row is valid, the message "No valid rows found. Check the file format." appears.

Codes assigned automatically

You don't have to invent codes. On import, KoreLab assigns the codes by itself. For Products and Bills of materials, the code column in the preview shows "auto" when you leave the field empty: the code is generated automatically. When the import creates new suppliers on the fly, they too receive an automatic sequential code (numeric, five digits, e.g. 00001), computed so that every new supplier gets a code different from the previous ones.

Suppliers not found (raw materials and packaging)

When you import raw materials or packaging and the file names a default supplier that doesn't exist in KoreLab yet, a yellow warning box appears before you confirm: **N supplier(s) not found in KoreLab**, with the list of missing names. Below it there is a checkbox:

- Leaving it checked (Automatically create these suppliers as Raw Materials + Packaging supplier): the missing suppliers are created with an automatic code and linked as default. You can complete their details later (VAT number, email, etc.) in the Suppliers section. These suppliers are created with the note "Created by bulk import".
- Unchecking it: the warning reminds you that "Raw materials will be imported without a linked supplier", meaning the data is kept but the link to the supplier is not created.

In the preview, a supplier that already exists is shown in green; one that was not found is shown in red with "... (not found)".

Special cases

- Units allowed for raw materials: Kg, L, pz (pieces), g, ml. Costs must be entered net of VAT.
- Allergens: write them separated by commas, choosing from glutine (gluten), uova (eggs), latte (milk), arachidi (peanuts), frutta a guscio (tree nuts), soia (soy), pesce (fish), crostacei (crustaceans), sedano (celery), senape (mustard), sesamo (sesame), lupini (lupin), molluschi (molluscs), anidride-solforosa (sulphur dioxide).
- For Products and Bills of materials, ingredients are written in the format "name:quantity" separated by the | character (e.g. Farina:0.5|Acqua:0.3); product packaging follows the same format. Names must exactly match the raw materials and packaging present in KoreLab, otherwise the entry is kept as a custom item.
- The colli column of Products (re-import) describes one outer case per segment, separated by |, with key=value pairs separated by ; — the keys are label, pezzi (pieces), peso (weight), cartone (case) and bancale (pallet) by exact packaging name, L/W/H (manual dimensions in mm), pattern (interlock or column), sbordo (overhang in mm) and noruota=1 (no rotation). A case or pallet not found by name is simply dropped; the rest of the case entry is imported.

- Imported Bills of materials are always created in draft status, even if you wrote "confirmed" in the file.
- The safest way to re-import products or bills of materials is to start from the dedicated export: use Products (re-import) or Recipes in the export block, so you get a file that is already in the right format.

Plan notes

Excel export is available from the **Starter** plan upwards. On the Free plan the **Export Data** block is visible but disabled: the notice "Export available from Starter" appears and the buttons turn into **Starter+**; pressing them opens the upgrade screen via the **Upgrade >** button. Downloading templates and importing data remain accessible on the Free plan as well.

Notes & Deadlines

Notes & Deadlines is KoreLab's built-in agenda: a monthly calendar with todos, reminders and deadlines that you can link to your products, recipes, suppliers, raw materials and packaging. You find it under the Notes & Deadlines menu item, in the PLANNING area.

Plan notes

- The feature is available only with the PRO plan. On a lower plan you see a presentation screen with the title Notes & Deadlines, a short description and the list of locked features, each preceded by a padlock: Monthly calendar with deadlines, Automatic alert for overdue notes, Link notes to products, recipes and suppliers, Google Calendar sync. At the bottom you find the Upgrade to PRO > button.
- Without the PRO plan you cannot create or manage notes on this screen.
- The quick button on cards (products, recipes, suppliers, etc.) also appears only with the PRO plan.

Step by step — creating a note

- Open Notes & Deadlines from the menu.
- Press the New note button in the top right: the New note window opens.
- Enter the Title * (required field, marked with the asterisk): while it is empty, the save button stays disabled.
- Add a Description if you need details (optional field).
- Choose the Type: Todo, Note or Reminder.
- Choose the Priority: Urgent, High, Normal or Low.
- Set the Deadline by picking a date from the selector.
- If you want, set the Alert time: this field is enabled only after you choose a date.
- Press Save. To leave without saving press Cancel.

Priority levels

- Urgent, High, Normal, Low.
- Each note shows a colored label with the priority name and has a colored bar along its left edge.
- Priority orders notes only among those without a due date: among undated notes, the most urgent come first. Notes with a deadline are sorted by date instead, from the nearest to the farthest, and in any case open notes come before completed ones.

Note types

- Todo: the default type; Todos show no extra type label.
- Note: for notes and annotations; the type label appears on the note.
- Reminder: for reminders; the type label appears on the note.

The monthly calendar

- On the left is the month's calendar, with the ‹ and › buttons to move to the previous or next month.
- Under each day with notes you see colored dots: red = past due (Overdue), teal = open, green = done. The legend is shown below the calendar.
- Today's date is highlighted.
- Click a day to filter the list and see only that date's notes; clicking the same day again, or pressing all, removes the filter.

Filtering and managing the note list

- Above the list there are three filters: All, Open (default) and Completed.
- To mark a note as completed, tick the checkbox to the left of the title; unticking it reopens the note. Completed notes appear struck through and dimmed.
- To edit a note press the edit button: the window reopens with the fields filled in.
- To delete a note press the delete button.

Special cases — overdue and today's deadlines

- An open note whose deadline has passed is marked Overdue (in red); one due today is marked Today (in orange).
- Below the deadline, if you set a time the ðbox appears with that time; if the time is empty you see the indication ð23:00 the day before.

Deadline alerts

- When there are open notes that are overdue or due today, a warning band appears at the top of the screen, with the number of overdue deadlines and the number of deadlines due today.
- The two counts correspond to open notes whose deadline has already passed and to those due on today's date, so you can see at a glance whether you have urgent commitments.

Step by step — linking a note to an item

- From the card of a product, recipe, supplier, raw material or packaging item, use the quick button: a New note window opens, already attached to that item (the button is available only with the PRO plan).
- At the top of the window you see the reference to the item (icon + type + name), for example Product, Recipe, Supplier, Raw material, Packaging.
- Fill in the Title *, an optional Note, the Priority, the Deadline and the Alert time, then press Save. This quick window has no Type selector.
- To open the full agenda from the quick window press Go to Notes >.

What happens — the link to the item

- Linked notes show a box in the list with the item's icon, type and name (for example "Product: ..."), so you always know what the reminder refers to.
- When you reopen the note for editing in the full agenda, the reference stays visible at the top as "Reference: Product — name".

Step by step — connecting Google Calendar

- In the Google Calendar panel at the top press Connect Google Calendar.
- You are taken to the Google authorization page: grant access to the calendar.
- Back in the app, the panel turns green with the status "Connected" and a confirmation message appears.
- To unlink the account press Disconnect.

What happens — deadline synchronization

- Only notes with a deadline can be synced; those without a date do not go to the calendar.
- When the account is connected, the Auto-sync option appears: if enabled, every time you save a note with a deadline it is created or updated on your Google Calendar automatically.
- If there are open notes with deadlines not yet synced, the Sync all (n) button appears and sends them in bulk, with a progress bar and a count of any errors.
- On every open note with a deadline, when the calendar is connected, you find a button to add it; if it is already synced, the button switches to updating it. Deleting a note that was already synced also removes the corresponding event from the calendar.

Special cases — syncing with and without a time

- If you set an Alert time, the calendar event is created at that time.
- If you leave the time empty, the "23:00 the day before" rule applies: the alert fires the evening before the deadline, giving you time to act.

TOOLS

Backup & Restore

The **Backup & Restore** feature lets you download a **complete** copy of your account — all your data **and** the physical attachments you uploaded (non-conformity photos and attachments, technical sheets, documents) — in a single ZIP file, and restore it whenever needed. You reach it from the **Backup** menu item (Tools group); at the top of the page you find the **Backup & Restore** title. The page is divided into three boxes: **Full backup (data + attachments)**, **Restore everything from ZIP** and the collapsible **Data-only backup (JSON) and master-data import** box (the previous format, kept for compatibility).

What it is for

- Keeping your entire file safe by storing a copy outside the program.
- Starting over on a new device or a new account, recovering everything: data and attachments.
- Always having a way back before major operations.

What the full backup (ZIP) contains

- All the data in your account: products, raw materials, packaging, categories, customers, suppliers, recipes, production runs, batches, warehouse, documents and the entire Quality file (records, non-conformities, audits, assessments…). It is no longer the old backup limited to four data sets: today nothing is left out.
- The physical files uploaded to the program: non-conformity photos and attachments, technical sheets and Quality center documents.
- Inside the ZIP you find a backup.json file with the data (including the format version and the date and time of the export) and a files/ folder with the attachments.
- Technical keys and secrets (for example integration credentials) are never included in the file: a backup can be stored without exposing credentials.

Step by step — Full backup

- Open the Backup page from the Tools menu.
- In the first box, Full backup (data + attachments), press Download full backup (ZIP).
- A progress bar shows the three phases: Reading data…, Attachments… and ZIP compression….
- The file is downloaded as KoreLab_backup_completo_YYYY-MM-DD.zip (with today's date) and a green confirmation message appears with the file size and the number of attachments included.
- Keep the file somewhere safe (a second disk, a USB stick or a cloud service).

What happens during the export

- The export is a simple read: it does not change any of the data in the program.
- If an attachment cannot be reached, the backup does not stop: the missing file is counted in the final message as not retrieved.
- If the backup is very large (over roughly 120 MB), a notice reminds you to keep it somewhere safe.
- A connection is required: if you are offline, a notice tells you the operation is not possible at the moment.
- The program records the date of this latest backup: this resets the backup reminder (see below) for the next 30 days.

Step by step — Restore everything from ZIP

- In the Restore everything from ZIP box, read the yellow warning: the full restore is allowed only on a new or empty account.
- Tick the I confirm this account is empty and I want to restore the backup checkbox: without the tick, the button stays disabled.
- Press Select ZIP and restore and choose a .zip file previously exported from KoreLab.
- The progress bar shows the Opening backup…, Restoring tables… and Attachments… phases.

What happens after the restore

- The tables are rebuilt in a single operation and the attachments are re-uploaded to your space: when done, a summary appears with the number of rows restored and attachments re-uploaded (indicating any failures).
- Reload the page to see the restored data.

- If the account already contains data, the restore is cancelled with a message: this rule prevents sealed records from being overwritten or duplicated.
- If you restore onto an account with a different ID (for example a new email), data and attachments are restored normally, but the seals and signatures of the records remain readable only as historical evidence: they do not re-verify on the new account, because a signature belongs to the identity that issued it.
- If the chosen file is not a valid KoreLab backup ZIP, the operation stops with a notice and your data is not touched.

Data-only backup (JSON) and master-data import

The third, collapsible box keeps the previous format:

- Download JSON backup exports the same complete data in a single JSON file (KoreLab_backup_completo_YYYY-MM-DD.json), but without the physical attachment files: the JSON keeps only their references. For the truly complete backup use the ZIP.
- If the cloud cannot be reached, the button falls back to a partial local backup (only products, raw materials, packaging, categories and customers, file name KoreLab_backup_YYYY-MM-DD.json) and an explicit notice warns you that certifications and records are NOT included.
- Import master data from JSON reloads from a JSON backup only the core master data — products, raw materials, packaging, categories and customers — replacing the current lists; only the sets actually present and non-empty in the file are replaced. The other data contained in the JSON is not re-imported: for a full restore use the ZIP.
- If the file cannot be read as valid JSON, the operation stops with an error notice and your data is not touched.

Automatic backup reminder

- The program reminds you on its own to make a backup, showing an orange Backup reminder bar at the top.
- The notice appears if at least 7 days have passed since first use and you have never made a backup, or if 30 days or more have passed since the last backup.
- The bar offers three commands: Download backup now (immediately exports the data-only JSON backup), Go to backup > (opens the Backup page, from which you can download the full ZIP) and the × to dismiss the notice.
- Dismissing the notice with the × or performing an export restarts the countdown: the reminder does not reappear for the next 30 days.

Difference from Import/Export

- Backup is a one-shot copy of the entire account (all data plus attachments, in the ZIP format), designed for safekeeping and full restore.
- Import/Export works instead on individual lists or data sets (raw materials, packaging, suppliers, products, recipes), useful for adding or updating specific entries.
- In practice: use Backup to protect or bring back the whole archive; use Import/Export when you need to move or update only part of the data.

Another ZIP: the Quality center's Historical archive

- Besides the backup, KoreLab produces a second ZIP file that should not be confused with this one: the Historical archive (10-year ZIP), which you download from Quality > Settings.
- It contains the Quality file in two forms — fascicolo.json (data in clear text) and fascicolo.pdf (human-readable, ready for an inspector) — plus the integrity manifest and a standalone verifier: it is designed for ten-year retention and to be read back and verified many years from now, even without KoreLab.
- It is not a backup you can restore into the app: to bring data back into KoreLab you need the full ZIP backup described above. The details are in the Quality center's Settings chapter.

Special cases

- Make a backup before major operations (mass clean-ups, experiments, account changes): that way you always have a way back.
- If you don't know where a file comes from, do not restore it: the restore rebuilds the account and there is no undo button.
- Make backups regularly and keep more than one: having copies from different dates lets you go back to exactly the right point in time.

- The full restore requires an empty account: if you only need to recover the core master data on an account already in use, use Import master data from JSON or the Import/Export tools.

KoreLab AI

KoreLab AI is the chat assistant included in the Pro plan: it answers questions about CPF, food cost, recipes and semi-finished products, EU allergens and HACCP, and it can ground its answers in your own data. You open it from the **AI** menu item (Tools group) or from the round bubble in the bottom right, present on every screen.

Where to find it

- AI menu item — opens the full-page chat.
- Bubble in the bottom right — opens a compact version of the same chat in a panel; at the top you can press — Expand to switch to the full page or × to close the panel. The bubble appears only if you have the Pro plan and the AI module is active, and it is not shown while you are already on the AI page.
- Assistant settings: Settings > KoreLab AI (budget, request counts and personal API keys).

Step by step

- Open AI from the menu (or press the bubble).
- On first access you see the greeting "Hi! I'm KoreLab AI." and some ready-made questions you can click, such as "How do I calculate a product's CPF?" or "How do I manage the 14 EU allergens for the technical sheet?": press one to send it right away.
- Alternatively, type your question in the field at the bottom, "Ask something… (Enter = send · Shift+Enter = new line)".
- Press Send or hit Enter to send; with Shift+Enter you start a new line without sending.
- While the AI is working, "KoreLab AI is processing…" appears; then the answer shows up with a small badge underneath indicating the model used.
- To clear the conversation and start over press New chat in the top right (it appears only once there are messages).

What happens

- The AI picks the model on its own based on the question: it uses the fast model (badge Haiku) for simple questions and the more powerful one (badge Sonnet) when the question is long or complex (over ~250 characters, or containing words such as "analyze", "explain", "compare", "why", "optimize"). There is no manual selector.
- The conversation is kept in memory only for the browser session (it is cleared when you close the tab); it is not archived in your records or in your certifications.
- At the bottom of the page you always find the notice: "Haiku for simple questions · Sonnet for complex analyses — automatic selection. Always verify critical calculations." The assistant is a support tool; it does not replace checking the numbers you use in your documents.

Answers grounded in your data (RAG)

- Below the input field there is the Answers grounded in your data checkbox, on by default. With it enabled, the AI first searches your products, recipes and the Manual sections of your plan, and answers using only those passages, citing its sources.
- When an answer is grounded, the wording "grounded in sources" appears below it, together with a "Sources:" line listing the passages used (number and label).
- If, with grounding enabled, no passage from your data is relevant enough, the AI does not make things up: it replies that the information is not available in the sources and suggests rephrasing or indexing your data. This is intentional behavior ("cite or abstain").
- To build or refresh the index press Index data (next to the checkbox, only on the full page, not in the compact panel). While it runs, the button turns into Indexing…; when it finishes, next to it you can read how many "indexed passages" there are.
- Indexing requires your own Google Gemini or OpenAI API key (Anthropic does not do embeddings). Without one of these keys the notice appears: "Indexing requires a Gemini or OpenAI key (Settings > AI)." and, under non-grounded answers, "Answer not grounded in your data — add a Gemini or OpenAI key in the AI settings."

Monthly budget and limit

- Without keys of your own, the AI uses the KoreLab key with a cap of €5 per month (that is the token cost, computed automatically). In the top right of the chat you see your usage, for example "€0.312 / €5.00", with a bar that turns green, then amber and finally red

as you approach the cap.
- The budget renews on the 1st of the following month.
- When you run out of budget, a red band appears — "You have used up your monthly requests" — with a message saying the budget renews on the 1st of next month; the input field locks and shows "Monthly budget exhausted — resume on the 1st of next month". New requests stay blocked until renewal.
- Budget details, total requests, and how many were fast or complex are also available in Settings > KoreLab AI.

Personal API keys (BYOK) — no limit

- In Settings > KoreLab AI, section API Keys (BYOK), you can enter your own Google Gemini, OpenAI and Anthropic (Claude) keys. This removes any budget cap: costs are charged to your account with each provider.
- For each provider: paste the key into the field and press Save (if one is already saved, the button becomes Replace); with Test you check that it works (result "working" or "error"); with Remove you delete it.
- Keys are encrypted on the server (AES-256-GCM) and are never returned to the browser: after saving you only see the last digits, for example "configured ···· 1234".
- Provider order matters: KoreLab tries them in the order listed and, if one fails or runs out of funds, moves on to the next. Reorder them with the ² and ¼ arrows next to the position number.
- Once you have at least one key of your own, the AI switches to "Your keys mode": the €5 cap disappears and at the top of the chat you see the active provider (Gemini, OpenAI or Claude) instead of the budget bar.
- The key format is checked: Gemini starts with "AIza", OpenAI with "sk-", Anthropic with "sk-ant-". If the format is wrong you get "Invalid key format for this provider."

Plan notes

- KoreLab AI is available only with the Pro plan. On a lower plan, opening AI shows a presentation screen with the Upgrade to PRO — See the plans button leading to the upgrade; the bubble does not appear.
- The Pro plan includes the €5/month token budget. Adding your own keys (BYOK) removes the limit entirely, and you pay for usage directly to the providers.

Installable app & offline use

KoreLab is a **PWA**: you can install it from the browser like a real app, on phones and computers, and use it even **offline**. Your data stays available without a connection, and changes made offline sync on their own as soon as you are back online.

Step by step — installing the app

- Computer (Chrome/Edge): open app.korelab.app and click the install icon in the address bar, or menu î > "Install KoreLab".
- Android (Chrome): menu î > "Install app" / "Add to Home screen".
- iPhone/iPad (Safari): Share button > "Add to Home Screen".

After installation you find the KoreLab icon (the bowl) among your apps, and it opens full screen, without the browser bar.

Offline use

- Open the app at least once while online: this downloads your data locally.
- From then on, even without a network, you can browse products, raw materials, packaging, recipes and the rest (you see the data from your last access).
- Changes made offline are queued and sync automatically when you are back online (notice "N changes synced"): nothing gets lost.
- Documents signed with the PIN (management review minutes, mock recall, audits) require a connection: offline you can view them but not sign them.

Updates

- When a new version is released, a notice appears with the Reload button: press it and the app switches to the updated version right away.

Special cases

- If you open the app offline on a device where you have never opened it online, there is no saved data yet: connect once to download it.
- On shared PCs remember that the app stays signed in to your account even after it is closed: sign out if the device is not yours alone.

Quality & Certifications — Overview

The Certifications section is KoreLab's Quality suite: a single self-control and certifications dossier where you manage mandatory HACCP and voluntary standards (IFS Food, BRCGS, ISO 9001, ISO 22000, FSSC 22000) together. You find it in the menu under Quality > Certifications, and it opens on the **Overview** sub-tab.

The underlying idea is one only: manage everything in a single place. HACCP is the mandatory baseline; voluntary certifications sit on top of HACCP, so that a single control satisfies multiple schemes (deduplication by thematic area). No separate, redundant modules: one assessment counts for every standard it belongs to.

What the suite contains

- HACCP (self-control) — the self-control required by law (Reg. (EC) 852/2004 art. 5, Codex method), checked by official ASL/NAS inspections. It is the baseline, always present.
- IFS Food (v8) — a GFSI standard for suppliers to European large-scale retail (DE/FR/IT). It includes HACCP.
- BRCGS Food Safety (Issue 9) — a GFSI standard of UK origin, required by Anglo-Saxon retailers. It includes HACCP.
- ISO 9001 (Quality) — a generic (non-food) quality management system. The audit outcome is expressed as non-conformities, with no KO.
- ISO 22000 (Food safety) — an Annex SL management system; on its own it is not GFSI.
- FSSC 22000 — a GFSI scheme: ISO 22000 + PRP (ISO 22002-x) + additional FSSC requirements.

How to get started

- Open Quality > Certifications.
- On first opening, as long as you have not activated any scheme, the What do you want to manage? screen appears: here you choose which standards to activate.
- To start with mandatory self-control only, press Activate HACCP only (in the green HACCP box).
- To add one or more voluntary standards, in the Voluntary certifications (multiple selection, on top of HACCP) list select the items you need: you can click the row or use the switch on the right of each row.
- Press Activate selected: the button shows in brackets how many schemes will be activated, counting the chosen voluntary ones plus HACCP (always included as the baseline). If you select nothing, the button becomes Activate selected (HACCP only) and activates HACCP alone.
- You can change the active schemes at any time from the Settings sub-tab (in the Active schemes box); deactivating a scheme does NOT delete the data.

The suite's sub-tabs

- Overview — the dashboard: for each active scheme it shows the percentage of requirements assessed and compliant, highlights critical requirements (KO for IFS, Fundamental clauses for BRCGS, sanctioned legal obligations for HACCP), upcoming deadlines and open non-conformities. It has the Print overview (PDF) button.
- Requirements — the gap analysis: you assess each requirement by choosing its Status (Compliant, Partial, Non-compliant, N/A or Not assessed).
- Manual — the self-control Manual, versioned.
- Audits & verifications — planning and recording of audits and verifications.
- Non-conformities — the CAPA register of NCs, with priority (it carries a badge showing the number of open NCs).
- Deadlines — periodic obligations and deadlines.
- Migration — the guided migration between certifications: when you move from one standard to another, it reconciles the areas and lets you carry forward the evidence already compliant instead of starting over from scratch.
- Settings — active schemes and editions, company profile, historical archive, dossier export and consultant access.

Special cases on the sub-tabs

- The sub-tabs are not always the same eight: alongside Manual an extra one may appear, tied to the consultant's proposed changes.
- If you are a consultant looking at one of your clients' data, you see My proposals.

• If you are the client/FBO and you have received proposals from the consultant, you see Consultant proposals, with a badge counting those still to be handled.

What the Overview shows

• A card for each active scheme, with REQUIREMENTS ASSESSED (percentage and number out of total) and COMPLIANT (of applicable), with progress bars.
• A summary of statuses with the counts: Compliant, Partial, Non-compliant, N/A.
• For schemes with critical requirements (HACCP, IFS, BRCGS), a dedicated box — Sanctioned legal obligations, KO requirements or Fundamental clauses — which turns red with an icon when there are non-conformities (in that case it is top priority), yellow if there are partial or not-yet-assessed critical items, green if everything is in order.
• For ISO 9001, ISO 22000 and FSSC, which have no critical requirements, a neutral summary: the audit outcome is expressed as major/minor NCs, no KO/Fundamental.
• The Upcoming deadlines box (with the Deadlines > button) and the Open NCs box (with the CAPA register > button); the latter also shows the number of NCs at HIGH PRIORITY (KO/FUND).
• From each card, the Open gap analysis > button takes you straight to the Requirements sub-tab.

How to print the Overview

• Open Quality > Certifications > Overview.
• Press Print overview (PDF) at the top right.
• KoreLab generates a PDF with coverage by scheme, upcoming deadlines, open NCs and the last audit. If generation fails, the notice "PDF print failed." appears.

What happens to the data

• With a cloud account, the data is saved to your account and synced across devices: you can see this from the indicator with the icon at the top.
• In local mode (indicator) the data stays on this device: in that case export the dossier regularly from Settings > Dossier (export / import) using the Export dossier JSON button.
• Every relevant act is written to an append-only event log (with timestamp): records are not overwritten, they are added. This log is the basis of the internal evidentiary value.

Export and archive (Settings)

• Export dossier JSON (the Dossier (export / import) box) saves the complete dossier to a JSON file: profile, requirements gap analysis, audits, NC/CAPA, obligations, manual and operational registers, with the event log. It is the basis of the backup and of the dossier to bring to an audit.
• Download ZIP archive (the Historical archive (10-year ZIP) box) creates a single self-verifiable file (dossier.json + dossier.pdf + manifest.json + verify.mjs + README.txt), designed to be re-read even many years from now without KoreLab. With a cloud account the ZIP includes the integrity-chain verification (seal); in local mode it has no cryptographic seal but remains internally evidentiary.
• Print dossier (PDF), next to the ZIP, prints the complete dossier as a PDF.

Signature and legal value

• Signatures in KoreLab are simple electronic signatures, applied via PIN: they are not qualified signatures (not QES/eIDAS).
• The dossier and its snapshots have internal evidentiary value (evidence for self-control and audit purposes): they are not a certification and do not replace the certification body nor compliant long-term archiving.
• With a cloud account the integrity-chain verification (seal) is included: the export can be verified link by link. In local mode the archive has no cryptographic seal, but remains internally evidentiary.
• Responsibility for food safety always remains with the FBO (food business operator): KoreLab supports you and your consultant, it does not replace you.

Quality — Settings and schemes

The Quality module's Settings are the panel where you decide which schemes/standards to manage, how the data behaves when you work on several standards at once, where you store and share the dossier, and how you grant access to your consultant. You find them in Quality > Settings (the last sub-tab of the module, marked by the gear icon).

What you find here (in this order, scrolling from the top)

- Active schemes — which standards to manage and with which edition.
- Company profile — the certification's registry data.
- Automatic opening of Non-Conformities — the rule by which out-of-limit results become NCs.
- Document retention — how long to keep each type of evidence.
- Historical archive (10-year ZIP) — the self-verifiable backup + dossier printout.
- Send to the HACCP consultant (expiring link) — a frozen read-only copy.
- Consultant live access (delegation) — real-time, read-only access.
- Template library (consultant) — export/import your text templates.
- Dossier (export / import) — the full JSON of the certification state.

Active schemes — how to do it

- Open Quality > Settings and look for the Active schemes card.
- You see the list of standards: HACCP (self-control) at the top (marked and labeled mandatory), then IFS Food, BRCGS Food Safety, ISO 9001 (Quality), ISO 22000 (Food safety) and FSSC 22000 (v7).
- For each standard, below the name, you read how many items it contains: the count changes by standard — HACCP shows the obligations (and how many are sanctioned), IFS the requirements (and how many KO), BRCGS the clauses (and how many Fundamental); for ISO standards without critical items the wording "audit outcome as NCs" appears instead.
- To activate or deactivate a standard use the Toggle switch on the right of the row (hover over it: the title says "Activate scheme" or "Deactivate scheme").
- When a scheme is active, choose the version from the Edition drop-down menu (for example "v8 (Apr. 2023)" for IFS or "Issue 9 (Aug. 2022)" for BRCGS). If the scheme is deactivated, the Edition menu stays locked.

What happens

- HACCP is the self-control required by law: it is meant to stay active at all times (IFS and BRCGS include and extend it), so it is marked as mandatory.
- Deactivating a scheme does NOT delete any data: assessments, audits, NCs and event logs stay in the dossier and reappear unchanged on reactivation.
- When you activate several standards together, KoreLab manages them in parallel on top of the HACCP baseline: each standard keeps its own requirements, its own edition and its own outcomes, with deduplication of controls by thematic area.
- New editions and future schemes will arrive as new selectable catalogs in this same card.

Company profile

- Fill in Legal name, Production site / address, VAT number and Quality contact.
- As soon as you edit a field, the Save profile button appears at the bottom right.
- Press Save profile to store the data: the button disappears once everything is saved.

Automatic opening of Non-Conformities

- In the Automatic opening of Non-Conformities card, choose how strictly out-of-limit results generate an NC in the CAPA register.
- There are three options, selected with a click (the active one is marked):
- Every out-of-limit opens an NC — maximum HACCP rigor: every non-compliant record generates a non-conformity in the CAPA register.
- Only critical deviations (CCP / HACCP) — opens an automatic NC only for registers that monitor a CCP or the HACCP area; other out-of-limit results stay flagged without an automatic NC.

- No automatic NC — records show the outcome but do not open NCs on their own: you open them manually from the Non-conformities tab.
- The outcome (compliant / out of limit) is always calculated from the limits, whichever option you choose.

Document retention

- In the Document retention card you see, for each type of evidence, the prudential default from the regulatory catalog and its source.
- To change a period, press Edit on the row, write the new rule and press to save (or to cancel).
- On a custom rule the label is marked "(custom)" and the º button appears to restore the default.
- At the top right, the Set 10 years (prudential) button applies, in one go, 10 years to the three key evidence types (lot traceability, general HACCP, certification evidence); once done it becomes 10 years set.

What happens with retention

- The defaults are prudential (with the verification date of the regulatory catalog shown at the top of the card); large-retail or export specifications may impose longer periods: customize them here.
- The 10-year preset does NOT touch personal and training data (subject to GDPR minimization): for those, the rule of deletion at the end of the obligation still applies.
- The substantive requirement is to never lose the data and to be able to re-read it; 10-year retention is a cautious choice aligned with art. 2220 of the Italian Civil Code.

Historical archive (10-year ZIP)

- In the Historical archive (10-year ZIP) card, press Download ZIP archive to obtain a single self-contained file, designed to be re-read and verified many years from now even without KoreLab.
- Alternatively press Print dossier (PDF) to print the complete dossier as a PDF (the paper "total certification"), without packaging the ZIP.

What the archive contains and means

- The ZIP contains the dossier in data format (denormalized, with titles, areas, editions, outcomes and dates in clear text), the dossier in PDF for human reading, an integrity manifest, a standalone Node verifier and an instructions file. No proprietary formats.
- With a cloud account the integrity-chain verification (seal) is included; in local mode the archive has no cryptographic seal and remains internally evidentiary.
- It is a preservation backup, not a certification: no automatic legal value, it does not replace compliant long-term archiving; the signatures are simple electronic ones (PIN), not qualified. Responsibility remains with the FBO. Keep multiple copies.

Consultant access (cross-reference)

From these Settings you can grant a consultant access to your dossier, in two distinct ways.

- Send to the HACCP consultant (expiring link) — creates a secure link to a read-only copy, frozen at a given date. Set the Consultant name/reference and the Expiry (7, 14 or 30 days; the initial value is 14 days), press Create link, then copy and send the address (you see it only at that moment). Below you find the Created links list with status (active, expired, revoked), creation date, expiry, number of openings and the Revoke button (only on still-active links).
- Consultant live access (delegation) — grant real-time, read-only access to your dossier from their account. Enter the Consultant email, press Invite and send the generated code (also visible only at that moment). Consultants with access appear in the Consultants with access list with their status (active, pending, revoked, expired) and the Revoke button (on active or pending delegations).

The delegation code must be pasted by the consultant into their account, pressing **+ Accept invitation** in the "Delegating clients" bar of their Quality module. Both flows require a cloud account (in local mode the buttons are replaced by a notice). For the full workings of the delegation, the signing of proposals and the consultant-side flow, see the dedicated section "Quality — Consultant access (delegation)".

Signature and legal value (consultant access)

- The snapshot is an immutable photograph at a given date, evidence with internal evidentiary value, not a certification; revocation blocks new openings but not copies already downloaded.

- In live access the consultant sees read-only and can propose actions to you but writes nothing: every act stays signed by you (the FBO). Legally they are a sub-processor under art. 28 GDPR appointed by you.

Template library (consultant)

- In the Template library (consultant) card, press Export library (JSON) to save your templates (standard texts and Manual templates, with client data already tokenized into placeholders).
- Press Import library… to load a template file and reuse it on this account/client.
- The import MERGES the templates with the existing ones without overwriting; a message tells you how many new items and how many new fields were added.

Dossier (export / import)

- In the Dossier (export / import) card, press Export dossier JSON to download the entire certification state: profile, requirements gap analysis, audits, NC/CAPA, obligations, manual (sections and HACCP Plan) and operational registers (including the append-only records), with the event log.
- To restore a state from a file, press Import dossier and choose the JSON.
- The import asks for confirmation because the current state is REPLACED by the file's (the operation stays tracked in the event log).

Special cases

- The import accepts only a KoreLab certifications dossier: a file of another type or an invalid JSON is rejected with an error message, without touching the current data.
- The Template library and the Dossier are two different things: the first moves reusable text templates (non-destructive merge), the second moves the entire state (complete replacement).

Re-initialization and migration between standards

Next to Settings there is the Quality > Migration sub-tab, which handles moving data from one standard to another and archiving deactivated schemes.

- Open Quality > Migration.
- In the Guided migration between certifications card, choose the Source scheme (the one you have already worked with) and the Target scheme, then press Analyze >.
- KoreLab compares the two standards area by area and classifies the areas into: To carry forward, Already aligned, New to assess, Extra (source only).
- Check the areas to carry over, then choose what to do with the evidence (Carry forward the evidence or Start from scratch) and what to do with the source scheme (Keep active or Streamline (archive the source)).
- Press Apply migration.

What happens in the migration

- It is a proposal, not a conformity assessment: what is carried over is marked «Partial — to be reconfirmed» and must be reviewed requirement by requirement, because a different standard may require additional evidence. Responsibility for the assessment stays with the FBO.
- The action is recorded in the event log (append only), but does NOT enter the sealed integrity chain: today the SHA-256 seal covers operational records only.
- No scheme is ever deleted: if you choose Streamline, the source scheme is only deactivated and archived (data preserved) and you find it again in the Scheme archive (history) card at the bottom of the page.
- From Scheme archive (history) you can re-read the state of a discontinued certification (requirements assessed, audits, last change) and reactivate it at any time with » Reactivate, without losing or duplicating any data.

Notes on the plan

- The Quality module and these Settings are available in the plans that include the Certifications/Quality suite; in plans that do not include it, the module appears locked with an invitation to upgrade.

- The cloud functions (expiring link, consultant live access, historical-archive seal) require signing in with a cloud account: in local mode the ZIP historical archive and the dossier export/import remain available, but without a cryptographic seal.

Requirements (gap analysis)

The Requirements (gap analysis) section lists all the requirements of the active certification standards and lets you record, requirement by requirement, where you stand: compliant, partial, non-compliant, not applicable or still to be assessed. You find it in the Quality > Certifications > Requirements module.

What it is for

- Seeing the entire list of requirements for each active standard (e.g. IFS Food, BRCGS Food Safety, HACCP, ISO 9001, ISO 22000, FSSC 22000), organized by chapter/section.
- Marking the status of each requirement and keeping track of who handles it and by which deadline.
- Linking the evidence (documents, records, links) that demonstrates compliance.
- Measuring coverage, i.e. how many requirements you have already assessed and how many are still to be sorted out.

The two views

- By chapter/section: requirements are grouped in the tree of the single standard, group by group. It is the default view when a single standard is active.
- By thematic area: requirements that address the same topic across different standards (e.g. IFS + BRC) are shown together, grouped by area. It is the default view when two or more standards are active. Each area also shows the owner label (Law, IFS + BRC, IFS only, BRC only) and, if it contains critical requirements, the critical-area tag.

To switch between the views use the two buttons at the top right: **By chapter/section** and **By thematic area**.

How to filter the list

- Use the Search field to filter by requirement number, title, note or owner (the box suggests «Number, title, note, owner…»).
- If two or more standards are active, choose which to view from the Scheme menu (the All option to see them all). If a single standard is active, this menu does not appear.
- Narrow by status from the Status menu (the All option or one of Not assessed, Compliant, Partial, Non-compliant, N/A).
- Check KO / Fundamental only to show only critical requirements (those that on their own can block certification).

A requirement's statuses

- Not assessed: the starting status, the requirement has not been examined yet.
- Compliant: the requirement is satisfied.
- Partial: partially satisfied, there are still things to complete.
- Non-compliant: the requirement is not satisfied.
- N/A: not applicable to the site; requires a mandatory justification (see below).

How to mark the status (quick way)

- Open the group (chapter, section, point or area, depending on the standard) by clicking its header: the ¾ arrow opens and closes the group.
- Find the requirement's row: on the left you see the number, any critical badge (KO for IFS, FUND for BRC), the asterisk for asterisked requirements (the auditor must always justify the assessment), any conditional tags, any standard-update tags and the title.
- On the same row, use the status drop-down (colored according to the current status) and choose the new value.

What happens

- The status is saved immediately, with no confirm button, and the row changes color.
- If you choose N/A from the quick menu, the system automatically opens the editor (the same one you open with Details) because the justification is mandatory: you cannot leave an N/A without an explanation.
- If you set a requirement to Compliant and by doing so you complete an entire thematic area (the area is fully compliant and has at least one piece of evidence) while several standards are active, the system carries the equivalent requirements of the other

standards over as «partial · to be reconfirmed» (never automatically compliant) and shows you a yellow Requirements unification notice at the top. It means the same fulfillment covers several standards, but you must verify and confirm it on the others too. The propagation only fills requirements still Not assessed or already Partial: it never touches those you have already set to Compliant, N/A or Non-compliant. The notice closes on its own after about ten seconds, or immediately with the × at the top right.

How to add note, evidence, owner and deadline

- On the requirement's row, click the Details button (it becomes Close when the editor is open).
- Set the Status from the editor menu (the same values as the quick menu).
- Fill in Owner (who handles it) and Deadline (date field) if needed.
- If the status is N/A, the N/A justification (mandatory) field appears: write why the requirement does not apply to the site.
- Write your observations in the Note field (gaps found, internal references, etc.).
- Add the evidence in the Evidence (documents, records, links) section: write a description (e.g. «Mock recall report 2026») and, if you like, an optional Link, then press + Add. Repeat for each piece of evidence; you can remove them with the × next to each.
- Press Save to record everything, or Cancel to close without saving.

What happens after saving

- If you set the status to N/A without writing the justification, saving is blocked with the message: «The N/A assessment requires a justification (it will also be requested in the audit report).» Fill in the field and try again.
- At the bottom of the editor the Last updated date appears.
- On the requirement's row, summary labels appear: ð with the deadline (in red if it has already passed), the owner, and the number of linked pieces of evidence.

The coverage indicator

- In each standard's header it is shown how many requirements are visible with the active filters (the system uses the standard's own term: «requirements», «clauses» for BRCGS, «obligations» for HACCP).
- On each group the number of requirements is shown and, in red, how many are «to be sorted out» (i.e. non-compliant or partial).
- The complete coverage count (requirements assessed out of total, compliant, partial, non-compliant, N/A and detail of the critical ones) is calculated for each standard and is the one that ends up in the PDF printout.

Updates to the standard in force

If a standard has updates in force today (Doctrine or Position Statements), a light-blue box «Standard updates in force today» appears at the top with the standard, the type and the version, and possibly the impacted clauses. On the individual affected requirements you see a tag with the version: keep it in mind when you assess compliance.

Legal obligations in thematic areas

In the by-thematic-area view, if the area is linked to legal obligations, a Law row appears below the header with the rule, the reference and any sanction: a single well-done control can satisfy both the legal obligation and the standards' requirements together. If the area has an explanatory note, a row with the advice appears at the bottom.

Printing the gap analysis

- At the top right, press the PDF button.
- A PDF is generated of the requirements status for each active standard, with the coverage counts, the requirements grouped by group, the status, the notes, the N/A justifications, the owners and the deadlines.

If generation fails, the notice «PDF print failed.» appears; try again after a moment.

Special cases

- When a filter lets no requirement through, instead of the list you see «No results with the active filters.»: widen or clear the filters.
- Requirements marked as critical (KO badge for IFS, FUND for BRCGS) and asterisked ones must be treated with particular care: they weigh in a specific way on the audit outcome. The ISO 9001, ISO 22000 and FSSC 22000 standards have no requirements marked as critical.

Self-control Manual

The Self-control Manual is your business's system document: it gathers the HACCP and quality procedures organized into versioned sections, with a title page, HACCP Plan and PDF export. You find it in Certifications > Self-control Manual (in the app the page title appears with the icon).

At the top the page shows a **Manual completion** progress bar, with the count "X/Y sections with at least one block" and the percentage. Next to it you find the **Title page** button and the **Print PDF** button. Below, the **Manual index** lists all the sections as a tree.

How it is organized

- Manual index: the tree list of the canonical sections (a skeleton derived from Reg. 852/2004, the 12-step Codex method and the IFS/BRCGS chapters). Only the clause references are reported, never the full text of the standards.
- Each index row shows the section title, its technical code (sezione_key) and possibly the document code, the possible revision number and a status label: Draft, Approved, Not applicable or to be completed.
- On the row, next to the title, appear the badges of the standards for which that section is mandatory (e.g. HACCP, IFS, BRCGS), filtered by the active standards. Here there is only the standard's name: the covered clause numbers appear inside the editor, when you open the section.
- The index also includes a HACCP Plan node (the 12-step Codex structure), which is filled in separately from the other sections.

The title page — how to do it

- Press the Title page button at the top: the Manual title page box opens.
- Fill in the Certification scope field (e.g. production and packaging of vegetable preserves) and the Distribution list field (e.g. Management, Quality Manager, Production).
- Press Save title page (the button appears only when you have changed something).
- Further down you find the Index (auto from sections), generated automatically, and the Manual revision table. To add a revision of the entire manual, fill in Version, Date and Reason, then press Revision.

What happens

- Legal name, COID (IFS), GLN/site code and the plant address are NOT written here: they are inherited from the company profile (Settings > Profile) and appear automatically in the PDF.
- The revisions added here concern the manual as a whole and end up in the Revision history at the top of the PDF; they are different from the revisions of individual sections.

Filling in a section — how to do it

- In the Manual index, click the section's row: the block editor opens below the row (the arrow changes from ¸ to ¾).
- Add content using the + block bar, which offers these types: Heading, Paragraph, List, Table, Reference, Attachment.
- Write the text in the block. For the List block the rule is "one bullet per line". For the Reference block choose the Reference type (requirement, lot, supplier, raw material, equipment, ccp) and specify the clause or the id. For the Attachment block choose a form/register from the linked drop-down.
- Reorder the blocks with the ‘ and “ arrows, or delete one with.
- When you are done press Save section (the button appears only if there are unsaved changes). The Saved confirmation appears.

Special cases

- For the Attachment block, if the form/register you need does not exist yet, press + New attachment: the New attachment (form/register) window opens. Enter the name (mandatory) and a possible purpose, then press Save as draft and select. The form is created as a draft (to be completed in the Registers sub-module) and selected immediately, without making you lose the manual page.

What happens on saving

- The section moves to the Draft status and in the index the label becomes "Draft"; the completion progress updates.
- The editor's technical fields are cleaned up before saving: only the actual content of the blocks (type, text and any reference type) is kept.
- If you edit a section that was already Approved or Not applicable, saving it automatically returns it to Draft (any previous approval is canceled and must be redone).

Generate standard text — how to do it

For many sections the app can propose a base text already written, compliant with the standard, for you to customize.

- Open the section. If available, below the blocks you see the standard text: item with a Generate for… drop-down.
- Choose a standard among the applicable and active ones, or the All active standards item (present when there is more than one).
- The text is inserted into the blocks. Next to the menu the note "then edit it and save" appears.
- Edit the text freely and press Save section.

What happens

- If the section already has text, the app asks for confirmation: OK = replaces the existing text, Cancel = adds the new text at the end.
- The company data (legal name, VAT number, address, registration) is inserted automatically in place of the placeholders; where a datum is missing, a highlighted placeholder in quotes appears (e.g. «legalName») so you notice it.
- The clause-references block is filled in by the app from a single source (the section's requirements, with a possible fallback to the mapping area): the clauses are not to be written by hand.

Marking a section «Not applicable» — how to do it

- Open the section and press the Not applicable button.
- Enter the justification in the window that opens: it is mandatory. If you leave it empty the marking is not applied and a notice appears.
- The section moves to the Not applicable status, shows a box with the justification, and in the index the label "Not applicable" appears.

What happens

- A section marked «Not applicable» is considered concluded for completion purposes: it counts in the progress as a completed section, no longer "to be completed".
- The marking stays tracked (it is a legitimate and documented choice) and invalidates any previous approval.
- To put it back in progress press © Reactivate (draft): the section returns to Draft status. Filling in and saving new blocks on an N/A section also automatically returns it to Draft.

Save / Apply template — how to do it

Templates let you reuse text already written on other clients or other manuals. The function is in the **templates:** row inside the section editor.

- Fill in the section with the text you want to reuse.
- Press Save as template and, in the window, give the template a name.
- To reuse it, open the same section on another client/manual and choose the template from the Apply saved template… menu.

What happens

- When you save a template, the current company's data is turned into placeholders, so the template is reusable on different clients.
- When you apply a template, the placeholders are re-substituted with the current client's data (basic automatic adaptation; you refine the rest by hand).
- If the section already has text, the app asks for confirmation: OK = replace, Cancel = add at the end.
- Templates are organized by section: next to the menu it shows how many you have saved (e.g. "3 saved").

Revisions and green diff — how to do it

- To create a new version of a section, open the editor and press ˜ New revision: a new version (number +1) is generated in Draft status, while the previous one stays tracked as history.
- From version 2 onward the What changed (rev. N) button appears: press it to see the comparison with the previous version (pressing it again closes it, the label becomes "Hide changes").
- Press Version history to see the table of all versions, with the columns Rev., Status, Drafting / approval and Updated.

What the diff colors mean

- Green = text added in the latest revision.
- Strikethrough = text removed compared to the previous version.
- Gray = text already present, unchanged.

What happens

- The comparison is word by word: you see exactly what changed, not just that "something" changed.
- Previous versions stay tracked on the cloud in read-only; in local mode only the current version is visible.

Signature, approval and legal value

- To approve a section in Draft, open the editor and press Approve.
- Enter the name and role of the person approving: the system requires it and, if you leave the field empty, it does not record the approval (no anonymous approvals — the approval has evidentiary value).
- The section moves to the Approved status, with the approver's date and name recorded.
- In the same way the HACCP Plan is approved with the Approve plan button, indicating who approves.

Signed proposals (consultant working on the client)

- When you work on a delegating client's dossier, the editor does not show the direct-write buttons (Save section, Approve, Not applicable, Reactivate, New revision): the change is not saved, it is proposed. After editing the blocks the Propose change button appears.
- Pressing it opens a panel where you enter a Proposal title (optional) and a Note for the FBO (optional), and you sign with the operator selector + PIN (the Sign the proposal with your PIN label). Operators and their PINs are configured in Settings > Operators. Press Send signed proposal.
- The change is sent as a signed proposal and does not touch the client's dossier until the FBO (QM/Quality Manager) approves and signs it in turn.
- The PIN must be numeric, from 4 to 8 digits. If the PIN is wrong or the operator is locked, sending fails with a message; the same applies if the delegation toward the client is no longer active or if the client does not have an active certifications subscription.
- Note on legal value: the signature is a simple electronic one (operator identity via PIN); it is not a qualified signature nor a timestamp. The manual has internal evidentiary value.

HACCP Plan

- The structure follows the 12 Codex steps. In this version, steps 1-5 (HACCP team, product description, intended use, flow diagram, on-site flow confirmation) and 11-12 (validation/verification, documentation) are editable ("editable" label).
- Steps 6-10 (hazard analysis, CCP determination, critical limits, monitoring, corrective actions) are marked "in progress" and are handled in the dedicated Production/CCP module; CCP monitoring can be recorded from the "CCP Monitoring" register in the Registers sub-module.
- If the plan does not exist, press Create HACCP Plan; then fill in the fields (name, HACCP team, product description, intended use, flow diagram, flow confirmation, validation and verification) and press Save plan. To create a new version use ˜ New revision.

Export to PDF — how to do it

- At the top of the page press Print PDF.
- The app generates and downloads the file Self-control_Manual.pdf with the entire completed manual.

What the PDF contains

- A professional Cover with logo and company data (from the profile), the title SELF-CONTROL MANUAL, the box of reference standards, the metadata (issue, revision, edition) and an honest legal note.
- A title page with the data and the Revision history.
- A general Table of contents with code, section/procedure, revision, date and real page number of each section, grouped into four macro-areas: Management system and organization, Prerequisite hygiene programs (PRP), HACCP Plan, Operational and control procedures.
- The manual's sections, ordered by their position in the catalog (not by date), each on its own page, rendered in structured form (headings, paragraphs, lists, references). Not applicable sections are marked; completely empty drafts are skipped.
- The HACCP Plan page, if present.

What happens behind the scenes

- To write the true page numbers in the Table of contents, the app performs two passes: the first measures on which page each section starts, the second generates the final PDF with those numbers.
- The logo appears only on the cover; if it is not readable, the app retries without the logo so the printout does not fail.

Where the data is saved

- A banner at the top of the page indicates the mode: Cloud (the data is saved to your account and synced across devices), Syncing, or Local mode (the data is only on this device — in this case export the dossier regularly from Settings > Dossier).

CCP — Critical Control Points

The CCP page gathers the Critical Control Points of your HACCP plan: for each point you define the step, the hazard, the critical limit, how it is monitored and the corrective action. You find it in Quality > CCP (the **CCP** menu item). Each CCP has a stable code (CCP-01, CCP-02…) and is versioned, exactly like the Manual sections: it goes through the states Draft, Approved and Obsolete. Only CCPs in the Approved state feed the verdict of the CCP Monitoring register.

What it is for

- Listing the points the HACCP plan keeps under control (cooking, blast chilling, storage, etc.).
- Setting for each one a measurable critical limit (the threshold beyond which the product is not safe).
- Indicating how, when and who performs the monitoring and what to do if the limit is exceeded.
- Providing the CCP Monitoring register with the threshold on which to automatically calculate the compliant / non-compliant verdict.

How to do it

- Open Quality > CCP.
- Press the + New CCP button at the top. The New CCP card opens (while it is open, the button becomes × Cancel). The code (CCP-…) is assigned automatically, you do not have to enter it.
- Fill in the Name / step field (mandatory, it is the only field required to save): it is the process step, for example Cooking or Blast chilling.
- Choose the Point type: CCP (critical control point), CP (control point) or operational PRP.
- Indicate in the Hazard field the risk the point controls, for example Pathogen survival.
- Define the Critical limit in the dedicated box. First choose the origin with the two selectors: Specific (you write it here) or From Limits library (you take it from a limit already recorded, code LIM-…).
- If you chose Specific, fill in the Parameter (e.g. core temperature) and the Type of limit among Range (min–max), Minimum only (>=), Maximum only (<=), Boolean and Value list. For numeric limits enter Minimum and/or Maximum and the Unit (e.g. °C); for Boolean or Value list fill in the Condition field.
- If you chose From Limits library, select from the drop-down the limit (LIM-…) already defined in the Limits library: the threshold is taken from there.
- Fill in the monitoring: Monitoring — how (e.g. core probe, reading), Frequency (e.g. per lot / every 2h) and Who (e.g. cooking operator).
- Write the Corrective action to apply if the limit is not respected (e.g. repeat the treatment / discard).
- Press Save. The CCP is born in the Draft state, version v1.

How to approve a CCP

- On the row of the CCP in Draft, press the Approve button.
- The request "Who approves this CCP? (first and last name — the approval is not anonymous)" appears: write the first and last name of the person approving. The approval cannot be anonymous.
- After approval the state moves to Approved and below the card the wording "Approved by [name] on [date] — feeds the verdict of the CCP Monitoring register" appears.

What happens

- As long as a CCP stays in Draft it does NOT feed the registers and does not even appear among the selectable CCPs in the CCP Monitoring register: a not-yet-approved threshold must not open real non-conformities.
- When the CCP is Approved, its critical limit becomes active and is used by the CCP Monitoring register to automatically derive the verdict of the entered measurements.
- In the CCP Monitoring register you choose the CCP and record the measured value. The system compares the value with the approved CCP's critical limit:
- - if the value RESPECTS the limit (within the range, above the minimum, below the maximum, condition true), the record is compliant;
- - if the value EXCEEDS the critical limit, the record is non-compliant: the deviation is triggered, requiring the corrective action

defined on the CCP (e.g. repeat the treatment / discard the product). This is the consequence foreseen by the HACCP plan to safeguard food safety.
- If the linked CCP is not (or no longer) approved or the threshold is not resolvable, the system never declares a non-verifiable value compliant: it marks it as an observation (prudential verdict), so the case stays visible and to be clarified instead of being passed as good.
- When the following measurements return within the limits, the new records go back to compliant: the exceedance stays documented on the row where it occurred, while the critical point is under control again.

Editing an already-approved CCP

- Press Edit on the CCP's card. The button is not available on Obsolete versions.
- The card warns: "Editing an approved CCP returns it to draft (the approval must be redone)". This serves to keep intact the value of what has been signed.
- Change the fields and press Save: the state returns to Draft and the indication of who had approved is cleared. Repeat the approval with Approve when the CCP is correct again.

New revision (version history)

- On an Approved CCP press — New revision.
- The current version becomes Obsolete and a new Draft is born with the same CCP code and the next version number (e.g. from v1 to v2), starting from a copy of the fields.
- On the card the Versions button appears (with the number of versions in brackets): open it to see the Version history, with the wording (current) on the version in force. This way the change history stays tracked. The button appears only when at least one obsolete version exists.

Searching, filtering and printing

- Use the Search CCP field to filter by code, name, parameter or hazard.
- The quick filters All, Drafts and Approved narrow the list by state.
- The PDF button generates the CCP Register as a PDF: a summary table (code, step/name, hazard, human-readable limit, state and version) and a detail for each point with hazard, critical limit, parameter/unit, monitoring, corrective action and — on approved CCPs — who approved and the date.

Important rules on approval

- A point of type CCP cannot be approved if it has no critical limit: the message "A CCP must have a critical limit to be approved." appears. Define the limit first (Specific or From Limits library).
- If you do not indicate who approves, the approval is refused with the message "Indicate who approves (the approval is not anonymous)."
- The Critical limit field shown on the card reads "to be defined" until you have set a valid threshold.

Where the data is saved

- In Cloud mode the CCPs are saved to your account and synced across devices (green banner at the top: "Cloud: the CCPs are saved to your account and synced across devices").
- In Local mode the CCPs stay on this device; cloud sync activates with the migration of the related table.
- If a change is not saved to the cloud, the notice "Change not saved to the cloud. It stays only on this device" appears: the change stays only on the device until sync resumes.

Delegated access (consultant)

- When a consultant opens a client's CCPs in delegated access, they see them read-only: the edit, approval and revision buttons do not write to the client's data. The single source stays the client's account.

Critical limits

The Critical limits are the Quality group's library of reusable thresholds: you find it as a standalone item in the Quality menu, under **Limits** (path Quality > Limits), next to CCP and Registers. It is NOT a sub-tab inside Certifications: it is an autonomous module of the Quality group. Here you define once values such as "Refrigerated room temperature <= 4°C" or "pH 4.2 … 4.6" and then recall them in the CCPs and registers, without rewriting them every time. Each limit has a stable code (LIM-001, LIM-002…) assigned automatically, and every change to the threshold stays tracked forever in a history with evidentiary value.

What it is for

- Centralizing the critical thresholds in a single place, so that CCPs and registers refer to the same value.
- Changing a threshold in one place only and propagating it to all the points that recall it.
- Preserving the documentary proof of who changed what, when and why.

How to do it (create a limit)

- Open the Quality group and choose the Limits item (Quality > Limits).
- Press the + New limit button at the top right. The New limit card opens: below the title the note "The code (LIM-…) is assigned automatically" appears, so you do not write the code.
- Fill in the Name field (mandatory, marked with *), for example "Refrigerated room temperature".
- Indicate the Quantity you are measuring (free field, e.g. temperature, pH, aw).
- Choose the Limit type from the drop-down, according to how the threshold is expressed (see below).
- Enter the threshold values and, where applicable, the Unit of measure (°C, %, …).
- Fill in, if you like, the Source (law, haccp, company, specification) and the Notes.
- Press Save. The button stays disabled (gray, not clickable) until the Name is filled in.

The five limit types

- Range (min–max): the quantity must stay between a Minimum and a Maximum (e.g. 0 … 4). You fill in both numeric fields.
- Minimum only (>=): the quantity must not fall below a value. You fill in only the Minimum (e.g. >= 65).
- Maximum only (<=): the quantity must not exceed a value. You fill in only the Maximum (e.g. <= 4).
- Boolean (compliant/non-compliant): the value is true/false. A single field appears, labeled Condition (==true compliant / ==false), where you write ==true (compliant) or ==false.
- Value list allowed: only certain values are accepted. A single field appears, labeled Allowed values (in:[a,b,c]), where you write in the form in:[green,yellow].

Units of measure and values

- For the Range, Minimum only and Maximum only types the numeric fields Minimum and/or Maximum and the Unit field appear. In the Minimum only type only Minimum appears, in the Maximum only type only Maximum appears. The unit is free text (°C, %, …) and is shown next to the threshold.
- For the Boolean and Value list types there are no numeric fields: you define the threshold in the Condition field (boolean) or Allowed values (list).
- On each limit's card the threshold is summarized in readable form: for example "<= 4 °C", ">= 65", "0 … 4 °C", "must be compliant", "must be false" or the list of allowed values.

How they are linked to CCPs and registers

• A limit, once saved, exposes its threshold (the min/max values or the condition) as an object referable by the other modules of the Quality group.
• In the CCPs you recall the limit by choosing it from a "From Limits library" list, where each item is shown as code and name (e.g. LIM-001 · Room temperature). It is the code (LIM-…) that acts as the stable link, not the name (which you can change without breaking the references).
• By defining the threshold once here, you avoid inconsistencies: all the points that cite the same LIM- use the same value.

What happens when you change a threshold

• Press Edit on the limit's card: the Edit LIM-… card opens. Below the title the code is shown as "(not editable)".
• If you change the values that define the threshold (Limit type, Minimum, Maximum, Condition or Allowed values), the mandatory Reason for the threshold change field appears (marked with *).
• As long as the reason stays empty, the Save button stays disabled (gray, not clickable): you cannot save the new threshold without first writing the justification.
• Write why you are changing the threshold (e.g. "client specification update"), then press Save. The change is recorded in an append-only history (add only): the previous row is never deleted or overwritten.

The change history (evidentiary value)

• Every time the threshold changes, a row is saved with the date, the value before, the value after, the reason you entered and (if present) the operator.
• On the limit's card, if there are recorded changes, the History (n) button appears, where n is the number of changes. Pressing it opens, below the card, the "Threshold change history (append-only)" list with all the rows in order. If there is no change yet the button does not appear.
• This register is the documentary proof of the control of critical limits: this is why the reason is always mandatory when you change an existing limit, and the save follows a "log first, then threshold" rule. If writing the log to the cloud fails, the threshold is NOT changed and the operation is canceled (the change is reverted).

Special cases

• On creation the reason is NOT required: the first threshold is tracked in the history anyway with the automatic justification "Limit creation".
• Changing only Name, Quantity, Source or Notes (without touching the threshold) does NOT require the reason and does NOT generate a row in the history.
• To take a limit out of use without deleting it, press Archive: the card stays consultable but grayed out (more transparent), marked as "(archived)". To put it back in use press © Reactivate. Archiving is not a threshold change, so it does not ask for the reason and does not write to the history.
• At the top you can search with the Search limit field (searches by code, name, quantity or unit) and filter with the All, Active, Archived buttons.
• With the PDF button you generate the document "Limits and thresholds register", which includes both the list of thresholds and the append-only history of changes.

Where the data is saved

• When you are connected to your account the green band "Cloud: the limits are saved to your account and synced across devices" appears.
• If the cloud is not available (or the related table is not yet active) the module switches to "Local mode": the limits stay on this device. It is an emergency behavior, not an error.
• If a single change cannot be uploaded to the cloud, the notice "Change not saved to the cloud. It stays only on this device" appears: you can hide it, but consider the change present only locally.

Delegated access (consultant)

• When a consultant opens a client's Limits under delegation, access is read-only: they cannot create, edit or archive limits on someone else's data. If they try to save a change on the card they receive the message "Read-only access (client delegation)". Changes always remain the responsibility of the data owner.

Operational registers

The Operational registers are the digital logbook of daily controls: temperatures, cleaning, calibrations, CCP checks and every other record foreseen by your self-control plan. You find them in Quality > Registers. Each register starts from a template and gathers the individual records over time, which stay forever in the history: they are added, not rewritten.

Where it is and how it is organized

The screen opens with a search box and the status filters, then two groups of registers.

- Operational — daily use: daily, per-shift and per-lot registers, i.e. what the operator fills in during work. They are at the top for quick consultation.
- Periodic and on-event: weekly, monthly, annual and occasional registers, consulted less frequently.

Each group shows next to its title a counter of how many registers it contains and, if there are open non-conformities, a red label with the number of NCs. A group that stays empty (for example because of the filters) is not shown.

At the top a banner also indicates where the records are saved: **Cloud** (saved to your account and synced across devices) or **Local mode** (only on this device: in this case export the dossier regularly from Settings > Dossier). During loading it shows ó**Syncing…** instead.

Choosing and finding a register

- Use the Search register field to filter by name, purpose or area; the field shows as an example "Temperatures, cleaning, CCP, calibration…".
- Or click one of the status chips: All, With open NCs, To fill in today, Never filled in. Chips other than "All" show a counter of how many registers fall in that condition.
- Each register is a card with a status badge on the left: In order, To fill in today, Never filled in or the number of open NCs. If the template has no fields configured yet, the Draft · to be completed badge also appears. Below the name you read the frequency, the area, the date of the last entry and how many records it contains.
- Click the register's row (or the ¼ arrow) to expand it and see the history.

How to do it — create and fill in a record

- On the register's card click Record: the entry form opens below the header.
- Fill in the register's fields. They are generated by the template and change from register to register: numeric fields (with a possible unit of measure), Yes/No switches, drop-downs, dates and quick-choice fields.
- Fields with an asterisk (*) are mandatory: if you leave one empty, on saving the message "Fill in the mandatory field:" followed by the field's name appears.
- In the quick-choice fields (equipment, CCP or limit) choose the item from the drop-down: the codes come from the linked registries. If the registry is not available, the same field becomes a normal text field where you write by hand.
- Set the Control date: indicate the actual moment when you performed the control. You cannot choose a future date.
- In the Operator field write who performed the control (it is free text, with the placeholder "Who performed the control").
- Click Record to save. To exit without saving use Cancel.

What happens — the outcome is calculated, not chosen

The outcome of a record (Compliant, Out of limit, Observation) is not declared by hand: the system calculates it by comparing the entered values with the register's limits. Below the form the phrase "The outcome (compliant / out of limit) is calculated from the register's limits: it is not declared by hand" reminds you.

- If all values are within the limits, the record is Compliant.
- If a value is out of threshold, it is Out of limit and, according to the company policy set in Settings, it may automatically open a Non-Conformity in the CAPA register. The register's card will then show the badge with the number of open NCs.
- The automatic-NC-opening policy has three options: open it for every out-of-limit, open it only for critical registers (CCP/HACCP), or never open it automatically.

- If a limit is not verifiable (for example a linked reference not available), the outcome is never declared Compliant for prudence: it becomes an Observation.
- If the register is linked to a deadline in the Deadlines, the record automatically closes that deadline.

Signature with the operator PIN

If operators with an active PIN have been created in the business (Quality > Operators), a green **Sign with PIN (optional)** box appears in the form.

- From the drop-down choose your name (the role appears next to it, if set). If you leave "— no signature —" the record is saved anyway, with only the name written in the Operator field.
- Once the operator is selected, the PIN field appears: type your code (digits only, up to 8).
- Click Record: the button shows "Verifying…" while the PIN is checked.
- If the PIN is correct, the record is signed with name, role and moment of signature. The name also stays in the Operator field anyway.

Special cases on the signature

- If you choose an operator but do not enter the PIN, "Enter the PIN to sign, or deselect the operator." appears.
- If the PIN is wrong or the operator is locked, "Wrong PIN or locked operator. Try again." appears and the record is not saved.
- If the signature service is not reachable, "Signature service unavailable: you can record without PIN (free-text operator)." appears: in that case you record anyway, indicating the operator as free text.

What happens — the append-only historicization

The registers are add-only: a saved record is never modified or deleted. This guarantees the evidentiary value of the history. Expanding a register you see the **Record history** block with a table that has the columns **Control date**, **Operator**, **Values**, **Outcome** and **Action**. The most recent records are at the top; the out-of-limit rows are highlighted and carry the **NC** tag.

Correcting a mistake — the reversal

- To correct a wrong record you do not rewrite it: you create a reversal. In the Action column of the row click Reverse (available only on actual records, not already reversed and not reversal ones).
- The request "Reason for the reversal (stays tracked, creates a new entry):" appears: write the reason and confirm. To not proceed, cancel the window.
- The system creates a new record of type Reversal: the original row stays visible but struck through and marked with the "reversed" tag, while the reversal appears as a distinct row. History is never rewritten. The note at the bottom of the history reminds you: "Append-only register: records are not modified nor deleted. A correction is a new reversal entry (the original row stays struck through and tracked)."

Exporting and printing

- On each register's card click PDF to generate the printout of that register's records, with the company-data header; the reversals and reversed rows are shown in the PDF.
- The Reminder button creates a reminder of the register in the Notes (it appears only if the app has the Notes function active).

Signature, seal and legal value

When you work in Cloud mode, the **Verify integrity** button appears in the filter bar: clicking it, the system recalculates the integrity chain (SHA-256 seal) of the records. While verifying it shows "ðVerifying…"; at the end it indicates the outcome.

- If the chain is intact, the button turns green with "Chain intact" and the number of verified links; if there is no seal yet it shows "No seal yet".
- If the chain turns out to be altered, the button turns red with "Integrity:" and the reason. It serves to demonstrate that the history has not been tampered with.
- If a record cannot be saved to the cloud, a red notice "Record not saved to the cloud." appears: the row stays only on the device. Check the connection and repeat the control, because the records have evidentiary value.

Notes on the plan and permissions

- The Registers are part of KoreLab's Quality/Certifications suite.
- If you are consulting a client's data as a consultant in delegated mode, the Registers are read-only: you can see and print the history, but not add new records nor reverse.
- The quick-choice fields are enriched automatically when you have filled in the Equipment, CCP and Limits registries. For CCPs, only approved ones are used in the quick choice and in the outcome calculation.

HACCP analysis (flow & hazards by step)

The "HACCP analysis" section is the heart of the self-control plan: you draw the flow diagram of the production process, define the inputs and parameters of each step, conduct the hazard analysis (biological, chemical, physical and other) step by step and, through the Codex decision tree, identify the critical control points. You find it in Quality > HACCP analysis.

What it is for

- Building the flow diagram of a product or a bill of materials, step after step (from receiving to shipping).
- Recording for each step the inputs (raw materials, semi-finished goods, finished product, packaging) and the process parameters (T °C, time, pH, aw).
- Doing the hazard analysis of each step with a Probability × Severity score (1-5 scale).
- Deciding, with the Codex 2022 decision tree, whether a hazard is a CCP, an oPRP or stays managed by the PRPs.
- Promoting the determined critical points to the CCP tab, where limits and monitoring are managed.

How to do it — create a process flow

- Open Quality > HACCP analysis. In the Process flows column press + New flow.
- Write the Flow name (mandatory), for example "Jam production".
- In the Referred to field choose what to link the flow to: Product, Bill of materials or Category.
- In the Item field use the link… selector to attach the corresponding registry item (optional).
- Press Create. The flow is born in draft state and is selected automatically.

How to do it — add and order the steps

- Select the flow on the left: the editor opens with the flow name, the state and the action buttons.
- Next to "Process steps" press + Step: a "New step" is created and its detail opens.
- Fill in Step name and choose the Step type from the list (receiving, storage, processing, heat treatment, cooling, packaging, labeling, shipping, other).
- If needed, enter the process parameters: T °C, time min, pH, aw.
- Reorder the steps with the ‘ (Up) and “ (Down) arrows, so the sequence mirrors the real process.
- To remove a step use the trash icon: confirmation is requested with "Delete this step and its hazards?", because it also deletes the linked hazards.

How to do it — record the step's inputs

- In the step detail, under "Inputs (RM / semi-finished / packaging)", choose the type from the menu: Raw material, Semi-finished, Finished product or Packaging.
- For raw material, semi-finished or finished product use the link or type… selector to attach the item from the registry; for packaging write a free description.
- Press + Input. The input appears as a label above the form; to remove it press the × on the label.

Marking a step as "finished product"

In KoreLab the "finished product" is indicated among the step's inputs, not as a state of the step itself. When the finished product enters or exits a step, add an input choosing the type **Finished product** and linking the item from the products registry. It is the intended way to signal the point in the flow where the finished product is obtained.

How to do it — the hazard analysis by step

- In the step detail, under "Step hazards", press + Hazard.
- Choose the Origin (Process or Raw material) and the Category of the hazard (biological, chemical, physical, allergen, radiological, fraud, gmo).
- Write the Hazard description (mandatory), for example "L. monocytogenes survival due to insufficient cooking".
- Set Probability and Severity on the 1-5 scale: the system immediately shows the P×S product and the level (low, medium, high,

critical). The full scale legend stays visible below the selectors.
• Check significant (> tree) if the hazard is to be taken to the decision tree.
• Press Save hazard. The hazard appears in the step's list with category, description, score and classification. If you did not mark it significant, it is saved as "not signif." and does not go through the tree.

How to do it — import the raw materials' hazards

• Make sure you have entered among the step's inputs the linked raw materials from the registry (type Raw material with the item attached).
• Press é Import RM hazards.
• KoreLab creates a hazard for each raw-material hazard that in the Assessments tab is active and marked "feeds HACCP", avoiding duplicates already imported.
• A message indicates how many hazards were imported; if it finds none, it reminds you to check that the incoming RMs have hazards with "feeds HACCP" in the Assessments tab. The imported hazards stay marked as coming from the raw material (· from RM).

How to do it — the decision tree and the critical points

• For a hazard marked significant, on its row press Decision tree.
• Answer the questions Q1-Q4 with Yes/No: the following questions appear based on the answers, following the path of the Codex 2022 tree.
• At the bottom the tree's outcome is shown (CCP, oPRP, PRP or "Modify process").
• Fill in the Justification of the classification (mandatory: it serves for defensibility in an audit).
• Press Save classification.
• If the outcome is CCP or oPRP, on the row 4 Create CCP in CCP (or "Create oPRP in CCP") appears: press it to promote the control point to the CCP tab. After the promotion the row shows the code of the created point (> e.g. CCP-01).

What happens

• The P×S risk score and the level recalculate automatically at each change of probability or severity.
• The "Determined control points" block at the top of the editor summarizes all the flow's CCPs/oPRPs (it appears only when there is at least one).
• Promoting a hazard to CCP/oPRP creates the item in the CCP tab with the automatic code CCP-01, CCP-02 and so on, and writes the link (ccp code) on the hazard: there you manage critical limits and monitoring.
• If you redo the tree and the outcome is no longer CCP nor oPRP, the link to the control point is removed from the hazard (with a notice) but the point stays in the CCP tab to be reviewed or archived.
• Deleting a hazard archives it (it stays in the history, it is not deleted); deleting a step also removes its hazards.

Approval and revisions

• As long as the flow is in draft, at the top you find Approve: you are asked who verifies the flow on site (operator name) and the flow moves to the approved state, recording the verifier and the date.
• On an approved flow + New revision appears instead: it creates a new draft, the next version, with a copy of the steps and hazards, while the current version becomes historical (superseded). In the copy the links to the CCPs are cleared, so you re-link them on the new version.
• Superseded versions no longer appear in the list of active flows.

PDF print

The **PDF** button generates the flow's HACCP analysis as a PDF: it includes the flow header, the steps with parameters and the list of hazards with scores, classification, control measures and CCP code.

Special cases

• Cloud or local saving: a banner at the top indicates whether the data is saved to your account (Cloud) or only on this device (Local mode, when the HACCP cloud tables are not yet active); during opening it may show ő Syncing…. In case of partial sync a yellow notice (Partial cloud sync) appears with the option to hide it.

- CCP promotion not available: if the CCP module is still syncing, the promotion is blocked with the message to try again in a moment (so as not to leave orphan links).
- Consulting a client's data (delegated access): when you consult a delegating client's data, access is read-only and writes are blocked.

Notes on the plan

The HACCP analysis is part of the Quality suite (Certifications module) and becomes accessible when you have unlocked the certification (Certifications add-on, or the plans that include it); without that access the Quality suite appears as a single item with an invitation to upgrade. It integrates with the Assessments of raw-material hazards (import) and with the CCP tab (management of limits and monitoring). It is the reference for HACCP principles 1, 2 and 6 (Reg. (EC) 852/2004) and covers the flow-diagram and hazard-analysis requirements of IFS (2.2/2.3) and BRC.

Assessments (suppliers, RM hazards, FCM, Food Fraud)

The Assessments module gathers on a single screen all the risk assessments on your supplies: supplier qualification, the hazard analysis of raw materials, vulnerability to fraud (Food Fraud / VACCP) and the suitability of food-contact packaging (FCM). It is in Quality > Assessments and, once inside, you choose the area to work on with the four buttons at the top: **Suppliers**, **RM hazards**, **Food Fraud (VACCP)**, **FCM packaging**.

At the top of the page a banner tells you where the data is saved: **Cloud: assessments saved to your account.** when you are connected and the tables are active, or **Local mode: the data is on this device (the assessments' cloud tables are not yet active).** when cloud saving is unavailable (in that case the data stays on your device anyway). The **Print assessments (PDF)** button at the top right exports three areas into a single document (qualified suppliers, RM hazards, FCM packaging).

A. Suppliers — qualification

In the **Suppliers** area you manage the qualification of each supplier: on the left the list of suppliers with their status, on the right the detail of the selected supplier with periodic assessments and certificates.

How to do it (add and assess a supplier)

- In the Suppliers card use the search field Supplier from registry or new… to choose a supplier already present in the registry or type a new one. If you have to create it, the picker opens New supplier with the fields Legal name and Code (optional).
- Press + Add. The button stays disabled until you have entered a name.
- The supplier appears in the list with its qualification label. Click the row to open the detail on the right.
- In the detail, under Periodic assessments, press + Assess.
- Fill in Period (e.g. 2026-Q1), choose the outcome among Suitable, Suitable with reservations, Not suitable and, if useful, add a row in Notes / KPI (deliveries, NCs…).
- Press Record assessment.

What happens

- The supplier qualification shown next to the name is ALWAYS the synthesis of the last recorded and non-reversed assessment. The Suitable outcome takes the status to Approved, Suitable with reservations takes it to With reservations, Not suitable takes it to Suspended. A supplier with no assessments is Not assessed.
- Assessments are add-only (append-only): they are not modified nor deleted. If an assessment is wrong, use the reverse link next to the row; the system asks for confirmation and creates a rectification that stays tracked (the canceled row appears struck through).
- In cloud mode the reversal can be done only after the original assessment has been synced: if it is too recent a notice appears inviting you to try again in a moment.
- The supplier's certification alone does not replace the risk assessment: even a certified supplier must be assessed.

Certificates and schemes

- In the supplier detail, under Certificates / schemes, press + Certificate.
- Choose the scheme among IFS, BRCGS, FSSC22000, ISO22000, ORGANIC, PDO, PGI, HALAL, KOSHER, OTHER; enter the Number and the expiry date.
- Press Save certificate.
- To take validity away from a certificate use the revoke link on the row (visible only on still-valid certificates): the system asks for confirmation and moves it to the revoked state.

Certificates with an already-passed expiry date are highlighted in red with a warning symbol and end up in the deadlines.

B. Raw material hazards — 5×5 matrix

In the **RM hazards** area you analyze the hazards associated with each raw material using the 5×5 risk matrix (Probability × Severity). The hazard families handled are: biological, chemical, physical, allergen, radiological, fraud, GMO.

How to do it

- Press + New hazard.
- In the Raw material field use Search or type the raw material… to select it from the registry or create a new one (fields Name, Unit of measure, Code).
- Choose the hazard Family and, if you like, specify the Type (subtype) (e.g. mycotoxin) and a Description.
- Set the Probability (1-5) and the Severity (1-5): each menu item also shows the descriptive scale (probability: rare, unlikely, possible, likely, frequent; severity: negligible, minor, moderate, serious, critical). The same full legend is always visible below the selectors.
- If the hazard is to be kept under control in the HACCP plan, check the significant (> HACCP) box.
- Press Save hazard. The button stays disabled until you have indicated a raw material.

Scores and thresholds

- The risk is calculated as Probability × Severity and ranges from 1 to 25. While you choose the values, the app shows in real time the Risk number and a 5×5 matrix highlighting the current cell.
- The level thresholds are: from 1 to 3 low, from 4 to 7 medium, from 8 to 14 high, from 15 up critical. The level is shown with a colored label (green, yellow, orange, red).
- The significant box serves to mark that the combination of probability and severity exceeds the acceptability threshold: the hazard is to be managed in the HACCP plan (as a CCP or with control measures). Non-significant hazards stay covered by the prerequisites (GMP / general hygiene).

What happens

- Recorded hazards appear in the table with the columns Raw material, Family, Hazard, P×S, Risk, Signif. and Actions.
- To update a hazard use Revise: the pre-filled form opens and, saving with Save revision, the previous version moves to "superseded" and a new active one is born (the revision history stays tracked).
- The archive link asks for confirmation and moves the hazard to the history as "superseded" (it is never deleted entirely).

C. Food Fraud (VACCP) — vulnerability to fraud

In the **Food Fraud (VACCP)** area you assess vulnerability to fraud on two fronts: at-risk raw materials and suppliers. The axes here are **Vulnerability × Opportunity**, but they use the same 5×5 scale and the same level thresholds as the RM hazards. At the top you find the **Export VACCP plan (PDF)** button.

How to do it (fraud-risk raw material)

- In the Fraud-risk raw materials card press + At-risk raw material.
- Select the Raw material from the registry or create a new one; indicate the Fraud type (e.g. dilution, substitution) and a possible Description / note.
- Set Vulnerability (1-5) (the RM's exposure to fraud: origin, complexity, history) and Opportunity (1-5) (ease or incentive to commit fraud: value, adulterability). The menu items show the scale (very low, low, medium, high, very high).
- Fill in the Mitigation measures (one per line) and the Alert sources (comma-separated) (e.g. RASFF, FoodAkai, consortium); set the Review by date.
- Press Save assessment.

How to do it (fraud-risk supplier)

- In the Fraud vulnerability by supplier card press + Supplier.
- Select the Supplier from the registry or create a new one.
- Set Vulnerability (1-5) and Opportunity (1-5).
- Fill in the Vulnerability factors: Geographic origin, Supply-chain complexity, Fraud history, Adulterability, At-risk claim.
- Enter the Mitigation measures (one per line), the Alert sources (comma-separated) and the Review by date.
- Press Save assessment.

Scores and outcomes

• The VACCP score is Vulnerability × Opportunity, with the same thresholds as the RM hazards: low (1-3), medium (4-7), high (8-14), critical (15-25). The level appears next to the number with a colored label and with the 5×5 matrix highlighting the chosen cell.
• For the high and critical levels it is best to define a mitigation plan with the measures and the alert sources.
• Fraud-risk raw materials share the RM hazards register (they are "fraud"-family hazards): so you also find them again in the RM hazards area, and here too Revise creates a new version and archive moves the row to the history as "superseded".

D. FCM packaging — food-contact suitability

In the **FCM packaging** area you assess the suitability of packaging intended for food contact, with reference to the Declaration of Compliance (DoC) and fitness for use.

How to do it

• Press + New packaging.
• In the Packaging field use Search or type the packaging… to choose it from the registry or create a new one (fields Packaging name, Code); optionally link a Supplier.
• Choose the Material among plastic, paper_cardboard, glass, metal, ceramic, multilayer, silicone, other.
• Set the Outcome among Under assessment, Suitable, Not suitable.
• Enter the reference to the Declaration of Compliance in DoC ref. and the DoC expiry.
• Press Save. The button stays disabled until you have indicated a packaging.

What happens

• Saved packaging appears in the table with the columns Packaging (where the supplier also appears, if any), Material, Outcome and DoC exp.
• The outcome is shown in colors: green for Suitable, red for Not suitable, yellow for Under assessment.
• A DoC with an already-passed expiry is highlighted in red with a warning symbol and enters the deadlines.

Deadlines and reminders

The module automatically feeds the deadlines by gathering: valid supplier certificates with an expiry date, expiring FCM packaging DoCs, the re-assessment dates of RM hazards (including fraud-risk raw materials, which are RM hazards) and the VACCP reviews by supplier. This way periodic reviews are not missed.

Notes on the plan and on saving

• When you are connected and the tables are active, the data is saved to your account (cloud banner). If the cloud is not available the app switches to local mode: you keep working and the data stays on the device; if you see the Partial cloud sync notice you can hide it with the hide link, the data is saved locally anyway.
• The by-supplier fraud assessment may end up saved only on the device until the related cloud table is active: in that case a dedicated notice appears below the Food Fraud cards.
• In delegated-access mode (when you consult a client's data read-only) the assessments are not editable: every write is blocked and the save buttons have no effect.

Food Defense (TACCP)

The Food Defense (TACCP) module serves to defend the product against intentional contamination — sabotage, tampering, malicious acts, theft/substitution and cyber attacks — unlike HACCP, which handles unintentional hazards. You find it in Quality > Food Defense. Here you build the threat assessment: you evaluate the threats for each business area, calculate the risk with the Probability × Severity scale (5×5) and record the preventive and control measures.

What it is for

- Identifying the business's vulnerable points (perimeter, receiving, warehouse, personnel, IT systems, utilities).
- Assessing how likely a threat is (Probability) and how much its impact on food/business safety weighs (Severity).
- Defining the defense measures (access control, seals, surveillance, IT security) and who checks them, at what frequency.

How to do it

- Open Quality > Food Defense.
- Press the + New threat button at the top right of the "Threat assessment (threats by area)" card. The entry box opens. The same button, while the box is open, becomes Cancel and serves to close without saving.
- Fill in the Area / point * field (mandatory): write where the threat is located, for example "External perimeter", "RM receiving", "FP warehouse".
- Choose the Area type from the drop-down: External perimeter, Internal area, Receiving / shipping, Personnel, IT system, Utilities (water/air/energy).
- Write the Threat * (mandatory): the description of what could happen.
- Choose the Threat type: Tampering, Sabotage, Intentional contamination, Theft / substitution, Cyber, Other.
- Choose the Actor (who could carry out the act): Internal, External, Insider, Unknown.
- Set the Probability (1-5) and the Severity (1-5) from the two menus. Each item shows the number and its label: for Probability from 1 rare to 5 frequent; for Severity from 1 negligible to 5 critical. The full 1-5 legend stays visible below the selectors.
- Fill in the Preventive measures (e.g. access control, seals, surveillance) and the Control / verification measures (e.g. seal inspection at unloading).
- Indicate the Control frequency (e.g. daily) and the Owner.
- Leave the Outcome on "(auto from risk)" to have it calculated automatically, or force it to Acceptable, To mitigate or Critical.
- If you want a re-verification date, fill in the Review by field (date selector).
- Press Save threat. The row appears in the table below.

What happens

- While you choose Probability and Severity, the Risk is calculated in real time as P × S and shown with its level (low / medium / high / critical).
- The level thresholds are: score from 1 to 3 = low, from 4 to 7 = medium, from 8 to 14 = high, 15 and over = critical.
- Next to the selectors you see the 5×5 P×S matrix: the rows are the Probability (from 5 at the top to 1 at the bottom), the columns the Severity (from 1 to 5). Each cell is colored by risk level; the cell corresponding to the chosen values is highlighted with a blue border and shows the P×S score.
- If you leave the Outcome on "(auto from risk)", the app determines it from the level: critical level > Critical outcome; high level > To mitigate outcome; medium or low level > Acceptable outcome.
- The Save threat and Save revision buttons stay disabled until you have filled in both Area / point and Threat: they are the two mandatory fields.
- The table shows for each active threat: Area, Threat, Actor, P×S, Risk (with colored level), Outcome, Review and the Actions.

Revising a threat (versioned assessment)

- On the threat's row press the Revise button.
- The box reopens with the current data already filled in: change what has changed.
- Press Save revision.

- The previous version is not deleted: it moves to the "superseded" state and stays in the history as evidence; the new version becomes the "active" one, visible in the table. This way the threat assessment's revision history stays traceable.

Archiving a threat

- On the row press the archive link.
- Confirm the request "Archive this threat? It stays in the history as 'superseded'.".
- The threat leaves the table but is not really deleted: it is put in the "superseded" state so as not to lose the history. The module never deletes the rows.

Periodic Food Defense check-list

The periodic on-site verification is not filled in on this screen. The **periodic check-list** for Food Defense is kept in the **Registers** tab, using the annual template "Food Defense check-list" (an append-only register with non-conformity management and deadlines). Here in Food Defense you build and maintain the plan (the threats and the measures); in the Registers you note the recurring controls.

Deadlines and review

If you fill in the **Review by** field, the threat generates a threat-assessment review deadline, useful to remind you when to re-assess. Only threats in the "active" state with a review date produce a deadline.

Export TACCP plan (PDF)

- At the top press Export TACCP plan (PDF).
- The app generates the document "TACCP_food_defense_plan" with all the active threats: area and area type, threat and type, actor, Probability, Severity, Risk, level, outcome, preventive and control measures, frequency, owner and review date, together with your company data.
- If the printout fails, the notice "PDF print failed." appears.

Special cases

- Status banner: at the top a notice indicates where the data is saved. "Cloud: threat assessment saved to your account." means everything is in the cloud. "Local mode: the data is on this device (the Food Defense cloud table is not yet active)." means you are working locally; the data is saved anyway and will be synced when the cloud is available. During the initial loading "⟳Syncing…" may appear for a moment.
- If you see the yellow notice "Partial cloud sync", the sync did not succeed: the data is saved on the device anyway. You can press "hide" to close the notice.
- If you are consulting a client's data in delegated access (read-only), the module shows the data but does not allow saving changes.

Regulatory references

The module addresses the Food Defense requirements of Reg. (EC) 178/2002 and of the certification schemes: IFS 4.21, BRC 4.2, FSSC 2.5.3.

Equipment (calibration/maintenance)

The Equipment register is the master list of your machines and instruments (thermometers, probes, scales, metal detectors, blast chillers, cold rooms, ovens, pH meters…) with their calibration and maintenance due dates. You find it in Quality > Equipment. Each piece of equipment receives a stable code (ATT-001, ATT-002…) that the other registers in the Quality suite can reference with a quick picker.

How to do it

- Open Quality > Equipment.
- Press + New equipmentat the top right: the New equipmentpanel opens. While the panel is open, the same button turns into × Cancel: pressing it closes the panel without saving.
- Fill in Name / description(the only required field, marked with *): for example "Probe thermometer cold room 1".
- Set the Typeby picking one of the suggestions (thermometer, probe, scale, metal detector, X-ray, blast chiller, cold room, oven, pH meter, other) or by typing your own: the field is not restrictive.
- Enter the Location(the department or line where the instrument is located).
- Set the Next calibrationby picking the date from the calendar.
- Set the Next maintenanceby picking the date from the calendar.
- Add any Notes(serial number, manufacturer, other).
- Press Saveto record the equipment. Cancelcloses the panel without saving.

What happens

- The code (ATT-…) is assigned automatically to the new equipment: you don't type it and, once created, it can no longer be changed. In the panel you see this indicated by the note "The code (ATT-…) is assigned automatically".
- The equipment appears in the list as a card with its code, its name and, below, the type and location (separated by a dot).
- The calibration and maintenance dates become colored labels on the card that alert you to the status of the due date (see below).
- The Savebutton stays disabled until you have filled in the Name / descriptionfield: without a name you cannot save. Any leading or trailing spaces in the name are removed on save.
- Date fields you leave empty simply stay empty and generate no due date.
- The cards in the list are sorted by code (ATT-001, ATT-002…).

The due-date labels

On each equipment card up to two labels appear, one for **Calibration**and one for **Maintenance**. The color and text depend on the date you entered:

- Red: the date has already passed. The label shows the word "overdue", for example "Calibration overdue".
- Yellow: the date falls within the next 30 days. The label shows the date, for example "Calibration 30/06/2026".
- Green: the date is more than 30 days away. The label shows the date, for example "Calibration 30/06/2026".

In practice the yellow and green labels show the same text (the label plus the date) and differ only by color: yellow signals that the due date is near, green that it is still far away. Only the red label changes its wording to "overdue". The label does not appear if you did not enter the corresponding date.

Searching and filtering

- Use the Search equipmentfield to filter by code, name, type or location.
- Use the quick filters at the top: All, Active, Due for calibration, Archived.
- The Due for calibrationfilter shows a counter with the number of active items whose calibration is overdue or due within 30 days, so you can see at a glance how many need attention.

Editing equipment

- On the equipment card press Edit.
- In place of the card the Editpanel opens with the code at the top (for example "Edit ATT-001") and the note "Code ATT-001 (cannot

be changed)".
- Update the fields you want to change: the code stays the same and cannot be modified.
- Press Saveto confirm or Cancelto exit without changes.

To update the due dates after performing a calibration or maintenance, just go into **Edit**and set the new dates in **Next calibration**and **Next maintenance**.

Archiving and reactivating

- To take a piece of equipment out of use press Archiveon its card.
- The equipment is not deleted: it is set aside (it appears with "(archived)" next to the name and the card fades to gray) and you find it with the Archivedfilter.
- To put it back into service press © Reactivateon its card.

Archiving is deliberately an alternative to deletion: the ATT- codes remain valid and the references used by the other Quality registers are not lost.

Printing the register

Press the **PDF**button at the top to generate the Equipment Register PDF, which includes both active and archived equipment with the due-date evidence. If generation fails, the app warns you with the message "PDF printing failed."

Cloud and local mode

- When your data is on the cloud you see the green banner "Cloud: the equipment registry is saved on your account and synced across devices".
- While the data is loading you see the "Syncing…" banner.
- In "Local mode" the registry is saved only on this device; the banner reminds you to export your quality file regularly.
- If a change fails to save to the cloud, the warning "Change not saved to the cloud" appears with the explanation "The latest change remains only on this device". You can dismiss the warning with the , but it's best to try again when the connection becomes available.

Special cases

- The code is the equipment's stable reference. In rare cases of offline work on two different devices the system might assign the same number: in that case the app automatically regenerates the code with the next number and retries the save, with no action needed from you.
- When you are viewing a client's data in delegated access, the registry is read-only: you can see the equipment but not create, edit or archive it.
- If the suite is still in local mode (not connected to the cloud), changes remain only on this device until the cloud connection is available.

Plan notes

The Equipment register is part of the Quality & Certifications suite. The equipment recorded here feeds, through its ATT- code, the quick pickers of the other Quality registers (for example when you need to indicate which instrument a measurement was taken with), so you don't have to retype name and code every time.

Warehouse & Traceability

The Warehouse & Traceability page manages incoming raw material lots, finished product lots, stock levels, shipments and the legal value of traceability (one-step-back / one-step-forward) with the mock recall test. It sits inside the Quality & Certifications module, in the **Production**group: in the menu the entry is **Warehouse**(at the top of the page the full title is " Warehouse & Traceability"). The page is divided into tabs that you select at the top: **RM Intake**, **Lots & Stock**, **Packaging**and **Traceability / Recall**(shipments and delivery notes are managed from Administration > Delivery notes & shipments).

One principle is worth keeping in mind from the start: stock levels are not a number you edit by hand, but the sum of an append-only movement log. Every receipt, issue, production and shipment generates an immutable movement with a positive or negative quantity; a lot's stock is the sum of all its movements. Corrections delete nothing: they add a reversal movement.

Where production is recorded

Production (consuming raw materials to obtain a finished product) is not recorded here: it is recorded from the **Production-**page (from a recipe). When you produce a batch there, the system automatically consumes the raw material lots in stock (using FEFO, earliest expiry first) and creates the finished product lot. This page then shows the updated stock and the generated FP lots, and is used for raw material intake, stock, shipments and traceability.

Receiving incoming raw materials

The intake records the arrival of a raw material lot from the supplier. The **Supplier lot**is the key to upstream traceability (one-step-back, Reg. 178/2002 Art. 18).

How to do it

- Open the RM Intaketab: you find the "Incoming raw material intake" card.
- In the Raw material *field choose the material from the registry with the search picker (" Search or type the raw material…"), or type it as free text. If the registry is connected you can create a new entry with New raw material(fields Name, Unit of measure, Code).
- In the Supplierfield choose the supplier from the registry (" Search or type the supplier…") or type it; you can create a new one with New supplier(fields Company name, Code).
- Fill in Supplier lot *with the lot code printed on the packaging or on the delivery note (DDT).
- Enter the Quantity *received and choose the Unitamong kg, L or pcs.
- Optionally, fill in DDT(delivery note number) and Expiry(the date).
- Press Record intake.

If you have a **barcode scanner**(or the mobile app with the camera), above the fields there is the **Scan or type raw material EAN + Enter**box: scan the EAN and the raw material with that code is selected automatically. The raw material's EAN is set in **Registry > Raw materials**(EAN / barcode field).

The **Record intake**button stays disabled until you have filled in the raw material, the supplier lot and a quantity greater than zero: these are the three required fields (marked with the asterisk). Below the form, the **Recent intakes**card lists the latest recorded intakes (up to 8) with material, supplier lot, supplier if any, quantity, arrival date and expiry.

What happens

- A raw material lot is created with initial status "accepted" and arrival date set to today.
- An intake movement with positive quantity is written: from that moment the lot's stock is available.
- The raw material and supplier data stay linked to the management registries but are also denormalized (the name is written into the lot), so the evidence survives even if the registry entry is deleted.

Lots & Stock

The **Lots & Stock**tab shows the stock levels calculated from the movement log, split into two tables.

Above the tables sits the filter bar: the **search box**(which also accepts a barcode read with the scanner), the item type and the two quick filters "Below minimum stock only" and "Expiring / expired". Search accepts several words, even separated or in a different order ("flour organic" finds "Organic type 00 flour"), as everywhere else in the program. The **clear filters**button resets everything in one click. The same bar, with the same filters plus the From/To period, is in the **Movements log**.

- The "Raw materials — stock (sorted by expiry, FEFO)" table is sorted by expiry (soonest first) and shows material/supplier lot, stock, expiry and status. Expiry dates already passed are highlighted in red with the symbol .
- The "Finished products — stock" table shows product/lot, stock, expiry, status and an Actions column.

How to release a finished product

- Open the Lots & Stocktab and scroll down to the finished products table.
- Find the lot with status "pending".
- Press the Releasebutton in the Actions column.

What happens

- An FP lot is born in "pending" status and must be released (after quality checks) before it can be shipped.
- Pressing Releasechanges the status to "released": only released lots then appear among those available for shipping. The Releasebutton appears only for lots still "pending"; for the others the Actions column shows a dash.

Shipments (one-step-forward)

The **Shipments**tab records where each finished product lot went: this is the data that closes downstream traceability and feeds the mock recall test. Only FP lots in "released" status can be shipped.

How to do it

- Open the Shipmentstab: you find the "Record shipment (one-step-forward)" card.
- Fill in Customer / consignee *(required).
- Optionally, fill in Outbound DDTand Carrier / courier.
- Press + Add lotto insert a shipment row.
- On each row choose from the dropdown the FP lot to ship (it shows product, lot code and availability) and type the quantity.
- Add as many rows as needed; to remove a row use the button.
- Press Record shipment.

What happens

- For each row a shipment movement with negative quantity is written on the FP lot: its stock drops accordingly.
- The shipment keeps customer, outbound DDT, carrier and the list of lots with their quantities: this is the data used to know "who to alert" in a recall.
- The Recent shipmentscard at the bottom shows the latest shipments (up to 6) with customer, lots, total quantity, date, DDT and carrier.

Special cases in shipments

- The + Add lotbutton is disabled if no released FP is available; in that case the notice "No released FP available." appears.
- If you type a quantity greater than the lot's availability, the quantity field turns red and the warning "> avail." appears: that row is not saved (it is discarded) at recording time.
- If there are FP lots not yet released, a yellow notice reminds you how many lots are awaiting release, to be released in Lots & Stockbefore shipping them.
- The Record shipmentbutton is active only if you have indicated a customer and at least one valid row (lot chosen and quantity within availability).

Upstream traceability (one-step-back)

In the **Traceability / Recall**tab, the first card "Upstream traceability (one-step-back)" starts from a finished product lot and traces back to all the raw materials used, the supplier lots and the DDTs (Reg. 178/2002 Art. 18).

How to do it

- Open the Traceability / Recalltab.
- In the "Upstream traceability (one-step-back)" card use the search picker (" Search FP lot — code, product, expiry…") and choose the finished product lot.
- Read the result: the system shows the lot code, the production date and the table of consumed raw materials with the columns Raw material, Supplier lot, Supplier, Qty and DDT.

What happens

- The raw materials <> production link is recorded at production (consumption) time and is append-only: it does not depend on a calculated stock, but on the link between FP lot, production and source lots.
- If no recorded consumption exists for that lot, the message "No consumption recorded for this lot." appears (typical of lots imported from history without their consumption data, see below).

Mock recall test (one-step-forward)

In the same tab, the "Mock recall test (one-step-forward)" card starts from a raw material lot and finds all the finished products that contain it and the customers to alert. It is the simulation of the recall test (required at least annually by IFS/BRC).

How to do it

- In the "Mock recall test (one-step-forward)" card use the picker (" Search RM lot — code, raw material, supplier, expiry…") and choose the suspect raw material lot.
- Read the recall outcome.

What happens

- At the top a " Recall outcome" box appears with raw material and lot, the number of FP lots involved, the quantity already shipped (to be recalled from customers) and the quantity still in stock (to be blocked).
- The "Finished products involved" table lists for each FP lot its code (FP lot), the product, the quantity in stock and the quantity shipped.
- The "Customers to alert" table lists customer, quantity and the lot detail with the outbound DDT. If there has been no shipment, "No shipments: the product is still entirely in stock." appears and the customer list is empty.
- If the raw material lot has not been consumed in any production, "This RM lot does not appear consumed in any production." appears.

Quantity reconciliation (mass balance)

Quantity consistency is guaranteed by the movement log: each lot's stock is the algebraic sum of its movements (positive intake, negative issue for production, positive production on the FP, negative shipment). This is the basis of mass balance: what came in must reconcile with what was consumed, produced and shipped.

- By system design a correction neither modifies nor deletes a movement: an adjustment (reversal) movement of opposite sign is recorded, so the history stays intact and verifiable. It is an architectural principle of the append-only log; on this page there is no dedicated "Reverse" button (tracked manual adjustments are handled in the operational Registers).
- Both in production (RM consumption) and in shipping the system prevents issuing more than what is available: the excess row is discarded and flagged, so stock never drops below zero because of a typing error.

Reconciliation between certification schemes

There is also a different kind of "reconciliation", which does not concern warehouse quantities but the transition from one certification scheme to another (for example from HACCP to IFS): for each thematic area the system proposes what can be "carried forward" as already-compliant evidence, always leaving confirmation to the FBO. It is proposed only when the source area is entirely compliant and has at least one attached proof; it is a proposal, never an automatic application, and it never propagates a negative status (a partial or non-compliant status is never carried over). You find it in the paths dedicated to scheme migration, not on this warehouse page.

Printing and quality file

At the top right the **Print stock (PDF)**button generates a PDF with the raw material stock (sorted by expiry) and the finished product stock, plus the most recent movements. It is useful as an attachment to the quality file or for verifying the mock recall test.

Cloud, local mode and consultant access

- A band at the top of the page indicates where data is saved: "Cloud: lots and movements saved on your account" or "Local mode: data is on this device" (to be exported regularly). If cloud sync is partial a yellow warning appears, which can be dismissed.
- Lots from historical production runs are imported automatically into the Warehouse once (cloud mode only), so they remain traceable; these imported lots show the finished product but not the historical raw material consumption (which cannot be reconstructed accurately).
- When a consultant opens a client's data in delegated access, the Warehouse is read-only: they can view lots, stock and traceability but cannot record intakes, releases or shipments (the block is enforced both app-side and server-side).

Signature and legal value

The value of this module lies in upstream and downstream traceability (Reg. 178/2002 Art. 18; IFS 4.18 / BRC 3.9) and in the recall test. The mock recall is an internal simulation of downstream traceability: it supports the recall test but does not replace the withdrawal/recall procedure or the notification to the authorities (Arts. 19-20 Reg. 178/2002). Keep the log updated with every intake and shipment: it is the append-only design that makes the evidence defensible in an audit.

Packaging (for packing)

- The Packagingtab loads packaging lots (trays, jars, labels…): choose the packaging from the registry (or scan the EAN in the Scan or type packaging EAN + Enterbox at the top of the card, if you set the EAN in Registry > Packaging), enter the Quantity (pcs)and, if you have them, supplier lot, supplier, delivery note, expiry and the MOCA DoCreference (Reg. 1935/2004). The table below shows the lots with the stock calculated from the movements log.
- Consumption does not happen here: it runs automatically (FEFO) from Packingon the Production page, for the primary packaging of the product sheet. If the expiry you enter precedes the arrival date (today), the intake is blocked with a warning.

Intake guided by a supplier order

From Sales > Supplier orders, **Record intake** opens RM Intake directly. At the top, pick the outstanding line: raw material, remaining quantity and unit are proposed; **supplier lot and expiry stay empty** because they must be read from the goods. After saving, KoreLab recalculates the remaining lines and proposes the next one while keeping the exact link to the source document. The arrival date is the local day on which you record the intake, including around midnight. You can also choose an order from the card dropdown, or select **Manual intake** for an arrival that did not start from an order.

Document reference in the Movements ledger

An intake recorded from a supplier order keeps the order's stable identifier in the ledger, but the **Movements ledger** tab and CSV show the **readable order number**, never the technical UUID. A manual intake continues to show the delivery-note number entered by the operator. Historical rows are neither converted nor rewritten: the ledger stays append-only and this distinction never changes quantities or stock.

Multiple warehouses (multi-location)

With the **Business**plan you can run **multiple warehouses**(depots, retail points, production sites) instead of a single one. Every movement — intake, production, transfer, shipment, adjustment — knows which warehouse the goods enter or leave, and stock can be read both per location and in total. You can create as many warehouses as you need.

One fixed point: goods are not moved by "correcting" a number. Every move is a **pair of movements**(issue from the source warehouse + receipt into the destination one) written to the append-only log. A lot's total stock never changes because of a transfer: only its distribution does.

Creating and managing warehouses

- Open Warehouse > Warehouses(the tab appears only on the Business plan).
- Press + New warehouseand fill in Name *(required), Codeand Notes.
- Press Save. The new warehouse is immediately selectable everywhere you choose where goods enter or leave.

The **Main**warehouse is the historical one: it holds every movement recorded before multi-warehouse was enabled, which is why it can be neither deactivated nor deleted.

The selector at the top of the page

At the top of the Warehouse page you find the **Warehouse**selector: choose **— All —**to see total stock, or a single location to work on that one only (stock, movements, shippable lots). It is also the default proposal in the intake forms, which you can always change row by row.

Choosing the warehouse when goods come in

Every intake has its own **Warehouse**(or **Destination warehouse**) field:

- RM Intake— where the raw material lot enters.
- Packaging intake— where the packaging lot enters.
- Product intake(goods for resale) — where the purchased product enters.
- Productionand Packing(Production page) — where the produced lot is born. In Packing the proposal follows the warehouse of the dough lot you are using, so the finished product is born where the goods actually are; you can still change it.

Consumed raw materialsalways leave the warehouse where they physically sit: there is nothing to choose, and you cannot consume from one location goods that are in another.

Choosing the warehouse when goods go out

The shipment (delivery note) form has a **Source warehouse**field: one document ships from one warehouse. The lots offered and the availability shown are those of **that**location; if you try to ship a quantity that isn't there, the row is discarded with a warning naming the warehouse, instead of driving the wrong location negative.

Moving goods between warehouses

There are two ways, both in **Lots & Stock**:

- Move(summary by item) — you think in items: "move 30 kg of flour from Main to North Depot". Choose quantity, source and destination; KoreLab draws from the lots present in the source warehouse using FEFO(earliest expiry first) and generates the movements lot by lot. If stock is not enough it moves what it can and tells you exactly how much is missing: a partial transfer is never silent.
- Transfer(detail by lot, and in the Packaging tab) — when you want to move one specific lot, stating the quantity yourself.

In both cases you cannot move more than what is in the source warehouse, and lot traceability stays intact: the lot code does not change, only its location does.

Seeing where the goods are

In the **Summary by item**, with the selector on **— All —**, each row shows a **Warehouses**column with one chip per location that actually holds stock (for example "Main 120 kg · North Depot 30 kg"). Locations at zero are not shown, so the row stays readable even with many warehouses.

Filtering the registries by warehouse

The **Product registry**, **Raw materials**and **Packaging**lists show two menus (only with at least two active warehouses):

- Warehouse— all warehouses or one specific location, chosen by name.
- Stock— any, In stockor Out of stock.

Combining them answers concrete questions: "which products do I have right now in the North Depot?" (warehouse + In stock) or "which items are out everywhere?" (all + Out of stock). On opening, the filters are neutral: the list is the complete one until you touch them. Choosing a warehouse moves the condition to **In stock**by itself, which is the most frequent case.

Assigning several items in bulk

In the **Product registry**, **Raw materials**and **Packaging**lists, selecting one or more rows also shows the **Assign/move warehouse (N)**button: it assigns the chosen operational warehouse to every selected item and transfers the quantities they already hold to the new location. It also works on items **at zero stock**, which move to the new warehouse from that point on.

Minimum stock per warehouse

In the raw material sheet, below the main fields, there is **Minimum stock per warehouse**: one box per active location. The threshold you set there applies **only to that warehouse**; leaving it empty means that location raises no alert. The general **minimum stock**(the field next to cost) still applies to total stock and does not change behaviour.

Items below threshold in a location appear in the **Below minimum stock by warehouse**panel (Lots & Stock, view on «All») and raise a dedicated notification: knowing *where* the goods are missing often means an internal transfer is enough, not a supplier order.

Deactivating or deleting a warehouse

- In Warehousespress Deactivateon the warehouse row.
- If goods are still inside, KoreLab opens a panel with the list of remaining stockand invites you to transfer it first. You can still proceed with Deactivate anyway: the goods are not lost and stay visible with the selector on «All», but you will no longer be able to ship or consume them from that location until you reactivate it.
- The Deletebutton appears onlyon a warehouse that never had movements, lots, shipments or stocktakes. With history behind it, deletion is blocked — server-side too — because removing it would orphan facts that already happened: there, deactivation is the correct route.

Special cases

- Multi-warehouse requires the Businessplan: on other plans the warehouse stays single and none of these fields appear.
- Movements recorded beforeactivation belong to the Main warehouse: nothing is lost and no data migration is needed.
- Stocktake: a counting session opens on a specific warehouse and its closing adjustments stay on that one, even if you change the selector meanwhile.
- In delegated access (consultant, read-only) warehouses can be viewed but not modified.

Audits & Verifications

The Audits & Verifications screen gathers the certification profile of each active scheme, the protocol deadlines calculated automatically, the audit history with its outcomes and findings (non-conformities), plus the score simulators. You find it in Certifications, in the Audit sub-tab. What you see changes depending on the schemes you have activated: for HACCP a panel dedicated to self-monitoring appears, for IFS and BRCGS a profile with deadlines and simulators, for ISO 9001 / ISO 22000 / FSSC 22000 a profile with the three-year cycle. The simulators at the bottom appear only if IFS or BRCGS is active.

How to do it — filling in the certification profile

- Open Certifications > Audit. At the top of each certifiable scheme you find a "certification profile" card.
- For IFS or BRCGS fill in the identification fields: Certification body (CB), COID (IFS)or Site code (BRCGS), GLN, Product categories, Initial audit dateand Next cycle audit type(Announced, Unannounced or Blended).
- For ISO 9001 / ISO 22000 / FSSC 22000 fill in Certification body (CB), Certificate no., if applicable Food chain category (FSSC), the Product categories / scopefield (or Scope of applicationfor ISO 9001) and the Stage 2 date (initial decision).
- As soon as you change a field the Save profilebutton appears: press it to store the data. Until you save, the changes remain pending (the button stays hidden if you haven't touched anything).

What happens — deadlines calculated from the protocol

- For IFS, once you enter the Initial audit date, the "Protocol deadlines (calculated from IFS Food)" card automatically shows the Anniversary date, Announced window, Unannounced window and Certificate validity, plus the timelines for the action plan, the follow-up, the CB notification and the minimum audit duration.
- For BRCGS the card shows the Audit due date, Unannounced window, NC closure (if any), Certificate issue and Validity by grade, with the limit on nominable blackout days. The Audit due date and the validity depend on the grade of the last recorded audit: if you haven't recorded any audits yet, the calculation starts from the Initial audit date.
- For ISO 9001 / ISO 22000 / FSSC 22000, once you enter the Stage 2 date, the "Certification cycle" card calculates the Initial audit (Stage 1 + Stage 2 or Stage 2 only), the Next surveillance and the Recertification / certificate expiry, with the closure timelines for major and minor NCs.
- As long as the starting date is missing you see a yellow notice inviting you to enter the initial audit date (for IFS/BRCGS) or the Stage 2 date (for ISO/FSSC) to activate the calculation.
- The numbers are never entered by hand: they derive from the protocol data in the scheme catalogs. Due dates are highlighted with a color that indicates whether they are far away, approaching (within 30 days) or past, and with the indication "in X days" or "X days ago".

The 1-in-3 rule (IFS / BRCGS)

- Below the deadlines you find a 1-in-3 rulelabel that counts the consecutive announced audits in the history.
- If the system detects that the time has come, it warns you that the next audit must be UNANNOUNCED (at least 1 in every 3). The counter feeds on the audits you record in the Audit history: the more you keep it up to date, the more reliable the warning.

How to do it — recording an audit and its findings

- Scroll to the Audit historycard and press + Record audit: the entry form opens (to close it without saving press the same button again, which becomes Cancelwhile the form is open).
- Choose the Scheme(the list contains only the active certifiable schemes), set the audit's Date (day 1)and the Type(Announced, Unannounced or Blended).
- Enter the outcome, which changes depending on the selected scheme.
- For IFS fill in Score %and choose the Level(Higher Level, Foundation Level or Not passed).
- For BRCGS choose the Gradefrom the dropdown (from AA+ down to D, or uncertified).
- For ISO 9001 / ISO 22000 / FSSC 22000 choose the Outcome (certificate status): Certified, Maintained (surveillance), Suspended or Withdrawn — these schemes have neither score nor grade.
- Record the findings in the numeric fields Minor NCsand Major NCs; for BRCGS Critical NCsalso appears, and for FSSC the Critical NCfield.

- In the Notesfield write down the outcome, the auditor and any observations.
- Press Save audit. The button stays disabled until you enter a date: without a date the audit is not saved.

What happens — after saving the audit

- The audit enters the Audit history table, sorted from the most recent date, with the columns Date, Scheme, Type, Outcome, NC and Notes.
- The Outcome column shows score and level for IFS, the certificate status for ISO/FSSC, the grade for BRCGS; the NC column summarizes the findings in the format "X min · X maj · X crit".
- New audits feed the 1-in-3 rule counter and, for BRCGS, contribute to the calculation of the Audit due date and the validity from the grade.
- To delete a row press the trash icon at the end of the row: the confirmation "Delete this audit from the history? The operation remains tracked in the event log." appears. The deletion therefore stays recorded in the event log.

Linking findings to non-conformities

- The Minor NCs, Major NCsand Critical NCsfields are used to record how many non-conformities emerged in that audit and to keep track of them in the history.
- Full non-conformity management (opening, treatment, corrective actions and closure) is in the dedicated section of the Certifications module; the audit history provides the count and the context to start from.
- The Print audits + NCs (PDF)button at the top right generates a PDF document that brings internal audits and non-conformities together in a single report, useful as evidence for the certification body or for your archive.

Special case — HACCP (self-monitoring)

- For HACCP there is no third-party audit and no score: the card is titled "HACCP (self-monitoring) — self-monitoring" with the label required by law.
- Fill in the profile: Self-monitoring manager (HACCP), Registration / SCIA (details), EC approval (if handling products of animal origin), HACCP manual dateand Last manual revision, then press Save profile.
- The panel reminds you that compliance is verified through official controls and shows a table with the penalty framework in case of non-compliance (columns Rule, Subject, Penalty). Clicking an underlined rule (or the button) opens a popup with the full text of the article, its heading, whether it is in force, any notes and the link to the official source; you close it with the Close button, the × or by pressing Esc.
- Verification and review of the HACCP plan should be recorded in the Deadlines panel, not in this screen.

The simulators (IFS and BRCGS)

- If IFS is active the IFS score simulatorappears: enter the number of requirements scored B, C, D, the Majors and the KOs scored D (plus the N/A) and you get the percentage, the outcome and the thresholds in real time (Foundation from 75%, Higher from 95%). The remaining requirements are considered A. If the counts you enter exceed the assessable requirements, an error message appears instead of the result.
- If BRCGS is active the BRCGS grading simulatorappears: enter the number of Minor, Major and Critical findings, tick whether there is a Major on a Fundamental and whether the audit is unannounced; you get the resulting grade and the certificate validity. A critical NC, a Major on a Fundamental or too many Majors lead to "Uncertified".
- The simulators are for estimating the result in advance: they record nothing. The real audit must still be entered via + Record auditin the Audit history.

Plan notes and legal value

- The Certifications module and its audit functions are available on the plans that include the Quality suite (specifically the Quality plan, the Pro plan with the Certifications add-on included, and the Consultant plan). If you don't see the section, check your plan in the subscription settings.
- The deadlines are calculated from the protocol catalogs, and the regulatory references and penalty amounts are indicative and verified as of a certain date: they do not constitute legal advice. Always check the version of the rule currently in force. Deleting an audit from the history remains tracked in the event log to safeguard traceability.

Non-conformities (CAPA)

The Non-conformities (CAPA) register is the Non-conformities sub-tab of the Certifications module: here you open, manage and close every non-conformity (NC), describing its cause and extent, defining the immediate correction, the root cause, the corrective action, the responsible person and the due date, all the way to closure with an effectiveness check. Each NC keeps its own transition history inside the NC itself, so who did what and when stays tracked.

At the top you find the counters (**Open**, **In progress**, **Closed**, **Verified**and **High priority**), a **Search**field to filter the register, and the **Status**and **Priority**filters. On the right are the **+ New NC**and **PDF**buttons.

How to do it — opening an NC

- Go to Certifications > Non-conformities.
- Press + New NC: the New non-conformitypanel opens.
- Choose the Originamong Audit (CB), Internal (internal audit / inspection)or Complaint(Internalis proposed by default).
- Enter the Origin date(the date the NC emerged).
- If the NC is linked to a standard requirement, check the Scheme(it is pre-selected on the first active scheme in your profile, but you can change it or leave it empty with —) and then fill in the Requirementfield: you can type it manually (e.g. 5.9.1) or pick it from the suggested list, which shows the requirements of the selected scheme with their title.
- Set the initial Status(normally Open).
- Fill in the Description(required, marked with the asterisk): write what was found, i.e. the extent of the problem.
- Press Record NC.

How to do it — describing cause, extent, corrective and preventive action

- In the Descriptionfield explain what was found and its extent (the severity of the problem).
- In the Immediate correctionfield indicate the containment of the problem, i.e. what you did right away to limit the damage (for example blocking a lot).
- In the Root causefield indicate the underlying cause, using methods such as the 5 whys or the Ishikawa diagram: it is the "why it happened".
- In the Corrective actionfield write the action that acts on the cause to prevent the problem from recurring. This is where you describe the preventive-corrective action (the "A" and the "C" of CAPA): the structural intervention that stops the non-conformity from happening again.

How to do it — assigning a responsible person and a due date

- Fill in the Responsiblefield with the person in charge of the action.
- Set the Action due date(the date by which the action must be completed).
- Save: on a new NC with Record NC, on an existing NC with Save update.

How to do it — updating and closing an NC with an effectiveness check

- In the list, click the NC's header to expand it and see its detail.
- Press Update NC: the Update NCpanel opens below the card.
- As you work, update the Statusmoving it from Opento In progress.
- Once you have verified that the action worked, fill in the effectiveness check block: Effectiveness check — date, Check outcome(choose Effectiveor Not effective) and Check notes.
- Move the Statusto Closedwhen the action is completed, and to Verifiedwhen the effectiveness check confirms the NC is truly resolved.
- Fill in the Note for the transition history (recommended)field explaining the step (e.g. "corrective action completed, awaiting verification").
- Press Save update.

What happens

- Every saved update appends a new entry to the NC's Transition history, with date/time, status and note: it is an append-only log, nothing is overwritten. On creation the entry "NC created" is recorded automatically. If you don't write a note, the entry lists the fields that changed.
- The Record NC/ Save updatebutton stays disabled while the Descriptionis empty: the description is the bare minimum needed to record the NC.
- The Priorityautomatically becomes highif the linked requirement is marked as critical (IFS KO / BRCGS Fundamental) in the chosen scheme: in the form, next to Requirement, the notice "(KO/FUND > high priority)" appears and the NC shows the HIGH PRIORITYtag in the list.
- The High prioritycounter counts only the high-priority NCs still Openor In progress, not those already closed or verified.
- The Searchfield filters not only by description and requirement, but also by responsible person, root cause and corrective action.
- For NCs with Origin = Audit (CB)linked to the BRCGS scheme, the app calculates a closure countdown (BRCGS protocol, 28 days from the origin date; if the origin date is missing, it counts from the creation date): the card shows a tag with the days remaining and flags it in red when the deadline is exceeded.
- The PDFbutton prints the Registro_NC_CAPA, i.e. the complete non-conformity register.

Automatic NC from an exceeded limit (CCP)

Non-conformities are not created only by hand. When you record an operational check that turns out to be out of limit, KoreLab can open the NC in the CAPA register by itself. The outcome (compliant / out of limit) is always calculated from the limits, never declared manually; if a check linked to a CCP exceeds the critical limit, automatic opening is triggered according to your company policy.

- The automatically created NC is born with Origin = Internaland a Descriptionreporting the detected out-of-limit result (register name and list of fields that violated the limit, with the values).
- The Requirementfield carries the name of the register the exceedance came from, so you trace back to the origin immediately.
- The NC starts in Openstatus: you take charge of it from the Non-conformities tab like any other, adding correction, root cause, corrective action, responsible person, due date and verification.

Plan notes — automatic opening policy

The behavior of automatic opening is set in Certifications > Settings, in the **Automatic opening of Non-Conformities**panel. The three options are:

- Every out-of-limit opens an NC: maximum HACCP rigor, every non-compliant record generates an NC in the CAPA register (this is the default option).
- Only critical deviations (CCP / HACCP): the automatic NC is triggered only for registers monitoring a CCP or the HACCP area; other out-of-limit results stay flagged without an automatic NC.
- No automatic NC: the records show the outcome but do not open NCs on their own, and you open them manually from the Non-conformities tab.

Whichever option you choose, the compliant / out-of-limit outcome is always calculated from the limits.

Special cases

- If you don't link any Scheme/Requirement, the NC is still valid, with Normalpriority: the link to the requirement serves the traceability towards the standard and the possible automatic high priority.
- When the register is empty you see the message "CAPA register empty. Record here the non-conformities from audits, internal sources or complaints."; if instead the filters match nothing, "No NC with the active filters." appears.
- Only approved CCP limits feed the automatic opening of NCs: a CCP still in draft does not generate real non-conformities.

QUALITY & CERTIFICATIONS

Deadlines

The Deadlines panel gathers in one place all the recurring obligations of your certification (calibrations, analyses, internal audits, training, mock recall, etc.), the document and lot deadlines, and the upcoming regulatory deadlines: it is one of the sub-panels of the Quality module, under **Quality > ðDeadlines**.

The view populates itself based on the schemes you have activated (legal obligations are always present) and the data you have already entered in the other modules: you only have to record when you did each thing, and the system calculates the next due date.

How to do it

- Open Qualityand select the ðDeadlinessub-panel from the panel bar at the top.
- In the first row you find the filters: use the Search obligationfield to search by name, area or note (the field suggests "Mock recall, calibration, internal audits…"), and the Statusdropdown to filter among All, Overdue, Due soon (<=30 days), OKand To be recorded.
- Scroll through the Recurring obligationslist: each row shows the obligation's name, the area, how often it must be repeated (e.g. "every 12 months"), the date of the last completion and the next due date.
- When you have carried out an obligation, press the green Record completionbutton on its row.
- A small form opens below the row: fill in Completion date(preset to today) and, if you like, the Note / evidencefield (the field suggests "E.g. report no. 12/2026, compliant outcome").
- Press Recordto save. If you no longer want to record, press Cancelon the row (the green button becomes Cancelwhile the form is open).

What happens

- As soon as you record a completion, KoreLab recalculates the next due date by adding the frequency expected for that obligation (e.g. every 12 months) to the date entered.
- Each row's status is updated with a colored label: Overdue, Due soon, OKor To be recorded(never performed).
- At the top, next to the filters, per-status counters appear (e.g. how many items are overdue, due soon, to be recorded): only the statuses with at least one item are shown, so you see at a glance what is urgent.
- The list reorders itself automatically, putting the overdue obligations first, then those due soon, then those never recorded and finally those in good standing.
- For each item you also see a day count next to the next due date: "in X days" if the deadline is in the future, "X days ago" if it has already passed.
- An item is considered Due soonwhen 30 days or fewer remain until the next due date.

The three sections of the view

- Recurring obligations: the obligations generated by the active schemes and by law. These are the ones you record with Record completion. Each item also carries a label indicating its origin: Law, IFS+BRC, IFS onlyor BRC only.
- Document and lot deadlines: items aggregated automatically from the other modules. They include the supplier certificates, the packaging DoCs (food contact materials / MOCA) and the hazard re-assessments from the Assessments module, the supplier VACCP and Food Defense reviews, and the expiry dates of raw material and finished product lots still in stock from the Warehouse module. This section appears only if there is data to show; next to the title you see the counters for overdue and due-soon items.
- Upcoming regulatory deadlines: the future legal deadlines relevant to the standards you have active. On each item, where available, you find an info icon with the details. At the bottom is the date on which the regulatory catalog was verified.

Reminders in Notes

- If the Notes module is active, next to each obligation the Reminderbutton appears (and a small icon on the document deadlines).
- Pressing it creates a reminder linked to that deadline inside the Notes module, so you don't risk forgetting it.

Printing to PDF

- At the top right, on the filter row, you find the PDFbutton.
- Pressing it generates a PDF of the deadline schedule reflecting what's on screen: the recurring obligations (with the active filters), the document and lot deadlines and the future regulatory deadlines.
- If printing fails, KoreLab shows the warning "PDF printing failed."; in that case try again.

Special cases

- If an obligation has never been recorded, its status is To be recordedand the next due date stays empty ("—"): until you record the first completion, KoreLab cannot calculate the cadence.
- If the filters let no rows through, the list shows the message "No obligations with the active filters.".
- The document and lot section appears only when the Assessments and Warehouse modules contain relevant data; lots are shown only if they still have stock and actually have an expiry date.
- The regulatory deadlines show only the future items relevant to your active standards: those valid for everyone always stay visible, while those for other standards or non-food scopes stay hidden. If there is no future item, "No future regulatory deadlines in the catalog." appears.

Plan notes

The Deadlines panel is part of the **Quality**module (Certifications & Quality). The document and lot section grows richer as you use the Assessments and Warehouse modules: the more you keep those modules up to date, the more complete the deadline picture will be.

Reliability of the regulatory content

The regulatory deadlines come from an internal catalog and are indicated as guidance only: they do not constitute legal advice. At the bottom of the section is the date on which the catalog was verified. Use them as reminders, but always verify the obligations that apply to your business.

Operators & PIN

The Operators section is where you register the people who sign the records and approvals of the quality system, assigning each of them a role and a PIN that acts as a simple electronic signature. You find it in Quality > Operators.

At the top of the page you see a box indicating how the data is being handled. If the cloud is active, the green **Cloud:**band appears, stating that operators and PINs are managed on your account and that the PIN is verified server-side. Without the cloud, the **Local mode:**band appears (registry on this device) and, right above it, a yellow warning: **The PIN requires the cloud (server-side verification). In local mode you can manage the registry, but PIN-based identity activates online.**During the initial loading, ó**Syncing…**may appear for a moment.

How to do it (creating an operator)

- Open Quality > Operators.
- Press the + New operatorbutton at the top right (the same button becomes × Cancelif you want to close the form without saving).
- Fill in the Full name *field (required, e.g. Mario Rossi).
- Choose the Rolefrom the dropdown: Operator, Quality manager, Approveror Administrator. When the form opens, Operatoris already preselected.
- Press Save. The button stays disabled while the name is empty.
- To edit an existing operator use Editon their card, change the name or role and press Saveagain.

How to do it (setting or changing the PIN)

- On the operator's card press Set PIN(if they don't have one yet) or Change PIN(if they already have one). This button appears only in cloud mode.
- The panel "New PIN for [name] (4–8 digits)" opens below the card: type the PIN in the first field (placeholder PIN) and repeat it identically in the second field (placeholder Repeat PIN). Both fields are hidden (password type) and accept only digits.
- Press Save PIN. The button unlocks only when the PIN is valid (correct format, not trivial, and the two fields match).
- To exit without saving press Cancel.

PIN rules

- Length: 4 to 8 digits. Numbers only (any non-numeric character is removed automatically as you type).
- The PIN and Repeat PINfields must match, otherwise the message "The two PINs do not match." appears.
- Trivial PINs are rejected, i.e. obvious sequences and repetitions: 0000, 1111, 1234, 123456, 000000, 111111, 12345678. As soon as you type one (and it matches in both fields) the notice " PIN too common: choose a less predictable one." appears below the fields and the Save PINbutton stays locked.
- If the format is invalid (fewer than 4 or more than 8 digits) the save does not start and "The PIN must be 4–8 digits." appears.
- The same check on trivial PINs is also applied by the server: if for any reason a weak PIN reached the save, the edge would reject it and "PIN too simple: avoid obvious sequences and repetitions (1234, 0000, 1111…). Choose a less predictable one." would appear.

What happens

- When you save the PIN, it travels directly to the secure edge (over HTTPS), which encrypts it with bcrypt and stores only the hash. The PIN is never sent to the database in plain text, never stored in plain text, and never shown on screen or downloaded.
- On a successful save the operator's card shows the green PIN setlabel. Until then, it shows the yellow PIN not setlabel.
- The PIN is never readable by the application: the hash is protected on the server and the client cannot read it back. It can only be set, changed or verified, never recovered. If an operator forgets it, you simply set them a new PIN with Change PIN.
- The registry (name and role) is saved on your account and also kept as a copy on the device; the PIN, instead, exists only on the server.

How signing with the PIN works

- When an operator needs to sign a record, an approval, the Manual or a proposal, the system asks them to select their name and type their PIN.
- The PIN entered is verified by the edge on the server, not on the device: the application does not compare it on its own. If it is correct, the signature is recorded with the operator's name and the date/time returned by the server; if it is wrong, the signature does not go through.
- Wrong PIN, deactivated operator and temporary lockout for too many attempts are not distinguished to the user: in all these cases the verification simply answers "not valid" and the signature fails, so it must be repeated with the correct PIN.

Deactivating and reactivating

- To take an operator out of use press Deactivateon their card: they stay in the list but grayed out (lighter), with "(deactivated)" next to the name.
- To put them back into service press © Reactivate(it is the same button, changing its label depending on the status).
- Deactivation does not delete the history of signatures already applied: it serves to prevent new signatures by someone who is no longer active, while keeping the traceability of the past.

Special cases

- In local mode (without the cloud) you can still create, edit, deactivate and reactivate operators, but the PIN button does not appear: PIN-based identity activates only online.
- If the PIN service is unreachable at save time (cloud or edge offline), "PIN service unavailable (cloud/edge offline). Try again online." appears and you must repeat the operation when connected.
- When you are viewing a client's data in delegated access, the view is read-only: writes are blocked, so you cannot create or edit operators or set PINs on that data.

Signature and legal value

- The PIN is a simple electronic signature: it verifiably links a record to the person who applied it, with name, role and moment of signing.
- Since the PIN is verified only server-side and encrypted with bcrypt (never in plain text, never recoverable), it is important that each operator chooses a personal, unpredictable PIN and does not share it: the signature counts as attributable to them.
- Set a PIN only for the operators who will actually sign (for example the quality manager or the approver for approvals, and the operators who fill in the registers).

Technical Sheets

Technical Sheets generate for each product a document compliant with Reg. EU 1169/2011 (information for the end customer), ready to export to PDF. The feature is in Quality > Technical Sheets. A sheet always starts from a product already in the software: ingredients, allergens and nutrition values are calculated automatically from the recipe, and you complete the missing information.

What a sheet contains

A sheet is divided into six tabs, which you find at the top under the light-blue notice:

- Ingredients & Allergens— ingredient list in order of weight, label preview, allergens present and from cross-contamination.
- Nutrition— nutrition declaration per 100g.
- Characteristics— physico-chemical, organoleptic and microbiological parameters.
- Storage & Use— temperature, shelf life and instructions for use.
- Packaging— packaging, material, net weight and transport.
- Certifications— GMO Free and various declarations.

How to create a sheet

- Go to Quality > Technical Sheets.
- In the New technical sheetpanel open the dropdown (placeholder — Select product —) and choose the product. Only products that do not yet have a sheet appear (neither as primary nor as a linked variant).
- The sheet opens immediately in editing mode, with the product name at the top.
- Fill in the tabs you need, then press Saveat the top right (while saving, the button shows Saving…).

What happens when you save

On the first save the software automatically assigns the sheet a document code (format ST-NNN/YYYY, where NNN is the three-digit progressive number and YYYY the year, e.g. ST-001/2026) and the revision number, which starts at Rev. 1. From that moment the sheet appears as a card in the list, under the **Technical sheet saved**heading, with its ST code (light-blue badge) and the purple Rev. badge, and reopens when you click on it.

The Ingredients & Allergens tab

The ingredient list is generated from the product's recipe and sorted from the heaviest to the lightest, as the label requires. The table has five columns: **Ingredient**, **%**, **QUID** , **Cert.**and **% visible**.

- The software puts the green check mark in the % visiblecolumn (i.e. shows the percentage on the label) only for: the characterizing ingredient (above 50% of total weight, flagged with the Caract.tag), the ingredient with the QUID checkbox on, or the ingredient with a certification detected in its name (DOP, IGP, STG, BIO, BIOLOGICO, DEMETER, BIODINAMICO).
- Allergens are highlighted in bold UPPERCASE directly in the list and in the label preview, as prescribed by Reg. EU 1169/2011.
- If the recipe uses a sub-recipe, the ingredients are expanded and the filling portion is grouped separately (Fillingrow, with its percentage alongside); with the Show % on label (QUID)checkbox on that row you decide whether to print the filling's percentage.

The "Detect QUID from product name" button

- In the Ingredients & Allergenstab press Detect QUID from product name.
- The software analyzes the product name (shown next to the button, after the arrow) and ticks QUID on the ingredients mentioned in the name.
- Careful: the button recalculates the QUID list from scratch, so it replaces any checks you added or removed by hand. After using it you can always correct manually by ticking or unticking the QUID box on each row.

At the bottom of the tab you find the **Sales denomination / Product description**field and, above it, the **Label preview — Ingredients**, which shows how the ingredient declaration will appear.

The allergens: present, cross-contamination, absent

Allergens are split into two blocks plus a summary table.

- Allergens PRESENT in the product: the 14 statutory allergens as buttons. Those derived from the raw materials are marked with and listed in the green row " Auto-detected: …"; they cannot be removed from here (they are edited in Raw Materials). The others you turn on or off with a click.
- Allergens from CROSS-CONTAMINATION: those not in the recipe but possible through cross-contamination in the workshop. Here too the marks the auto-detected ones, not editable from here. An allergen already marked as present does not appear among those selectable for cross-contamination.
- When there is at least one allergen (present or from cross-contamination), the Allergen table PDF previewappears with three columns: Present, Cross-contamination, Absent.

The Nutrition tab

The per-100g values (title **Nutrition Declaration (per 100g)**) are calculated automatically from the recipe: in that case you see the green **Calculated from recipe**badge and the fields on a green background. Energy in kJ is the read-only field derived automatically from the kcal.

- If you edit a value by hand, the declaration switches to manual; to go back to the automatic calculation press © Use auto.
- If some ingredient lacks nutrition data, an orange notice lists the missing ingredients and states the calculation's coverage percentage (e.g. "The calculation is partial (80% coverage)").

The Characteristics, Storage and Packaging tabs

These tabs contain descriptive fields that you fill in yourself:

- Characteristics: in the Physico-Chemical block pH, Water activity (Aw)and Moisture %(empty fields are not printed on the PDF); in the Organoleptic block Appearance, Color, Taste, Smell / Aroma; in the Microbiological Parametersblock a text area with one parameter per line.
- Storage & Use: Storage temperature, Shelf life / best-beforeand Instructions for use. Below these fields, where available, you find a preset text selector that lets you insert ready-made phrases.
- Packaging: Packaging type, Material, Net weightand Transport conditions(again with a preset text selector where available).

The Certifications tab

- Tick GMO Freeif the product contains no GMOs (Reg. EC 1829/2003).
- In the Certifications (one per line)field list the product's certifications, one per line (e.g. PDO, PGI, EU Organic, IFS Food, BRC Grade A, Kosher).

The producer's details (company name, address, VAT number) are not entered here: they are included automatically in the PDF from Settings > Company Data (the light-blue notice at the bottom of the tab reminds you).

One sheet for multiple products (variants / formats)

The same sheet can cover several products that are the same food in different formats (different weight).

- Open the sheet and find the Products covered by this sheetpanel.
- The main product is marked with the star .
- From the + Add variant / format…menu choose another product to link.
- To remove a variant, press the × next to its name.
- Save with Save.

In the list, a sheet with linked variants shows the green "+N var." tag (e.g. "+2 var."). Products already covered by a sheet no longer appear either among those you can create a sheet for or among the linkable variants.

The ST code and revisions

Each sheet has an ST-NNN/YYYY document code (light-blue badge) and a revision number (purple Rev. badge). When a sheet has already been saved, the **New revision**button appears at the top.

- Press New revision.
- The confirmation "Create Rev.X?" appears: press Confirm(or Cancelto not proceed).
- The software creates the new version, which keeps the same ST code but increases the revision number and carries the "revision of previous version" tag. From here you update the sheet while keeping the version history.

To delete a sheet press **Delete sheet**: a confirmation request appears with the **Confirm**and **Cancel**buttons.

The "Product updated" signal (review needed)

When the upstream product changes (recipe, ingredients…), the sheet goes out of alignment: at the top of the sheet the yellow **Product updated**notice appears ("Product data has changed since the last saved sheet. Review and save again.") and, in the list, the **Review needed**tag on the card. It is the signal that you should check the contents and save again (or create a new revision).

Exporting the PDF

- Open the sheet (or save it first, if you have just made changes).
- Press Generate PDFat the top right.
- The PDF carries all the data you filled in, the ingredient and allergen tables, the nutrition declaration, the ST code, the revision number, the list of linked variants and the company data from Settings. The downloaded file is named Scheda_ProductName followed by the ST code.

Returning to the list

Inside a sheet, to go back to the list press **< List**at the top left. From the list, the **< Back**button returns to the previous screen.

Important notes

- The sheet contains only information intended for the end customer: costs, margins and production notes stay out and are managed elsewhere (the light-blue notice at the top of the sheet reminds you).
- Allergens and nutrition values are updated from the raw materials: if a figure is wrong or missing, correct it in the raw material (Raw Materials), not in the sheet.
- Always save with Savebefore closing or generating the PDF: changes are not saved on their own.

Data Migration

Data Migration is the sub-module of the Quality module (path Quality > Migration, where "Migration" is one of the tabs at the top, next to Overview, Requirements, Manual, Audits & Verifications, Non-conformities, Deadlines and Settings) that helps you "carry forward" the work already done on one certification scheme when you move to another (for example from HACCP to IFS, from IFS to BRC, or a reverse transition). It does not import external files: it works on the data already in your quality file — the requirements you have assessed and the evidence you have documented in one scheme — and proposes carrying them over to the target scheme, area by area. It is always a guided PROPOSAL, never an automatic operation.

What it is for

- Reusing what is already compliant and documented in one scheme when you activate another, without starting from scratch.
- Comparing the two schemes thematic area by thematic area, and seeing right away what matches and what must be assessed anew.
- Keeping the entire history: no scheme is ever deleted.

Before you start

At the top you find a fixed notice recalling the principle of the feature: **It is a proposal, not a conformity assessment.**What you carry over is marked as "Partial — to be reconfirmed", because a different standard may require additional evidence. Responsibility for the assessment remains with the FBO, and no scheme is ever deleted.

To use Migration you must have at least one scheme with data. If you haven't assessed requirements on any scheme yet, you will see the message "No scheme with data to migrate. First assess the requirements of one scheme, then come back here to carry them over to another."

How to do it

- Open Quality > Migration. The tab is titled Guided migration between certifications.
- In the Source schemefield choose the scheme you have already worked with. For each available scheme you see in brackets the number of requirements already assessed, written as "(12 assessed)". The dropdown lists only the schemes that have data.
- In the Target schemefield choose the scheme onto which you want to carry the work forward. The scheme chosen as source does not appear among the targets, so you cannot select the same scheme as both source and target.
- Once both are chosen, an indicative direction hint appears below: Upgrade(the target is typically broader/stricter), Downgrade(it typically covers fewer areas) or Lateral(comparable rigor, different scopes). It is only an indication of typical rigor, not a judgment of legal equivalence.
- Press Analyze >to start the comparison. The button stays disabled until you have chosen two different schemes.
- The preview opens: at the top you read the summary "X to carry forward · Y already aligned · Z new · W extra". The areas are grouped into four classes (see below).
- In the To carry forwardclass each area has a checkbox: leave it ticked to carry that area over, untick it to exclude it (by default the areas start ticked, i.e. included). Ticked areas are highlighted in green and show the > partiallabel and how many requirements will be carried over ("N to carry over").
- Choose What to do with what is already compliantbetween Carry forward the evidence(carries over the requirements of the ticked areas as "Partial — to be reconfirmed", copying the proofs) and Start from scratch(activates the target only, without carrying anything over). When you choose Start from scratchthe area checkboxes disappear, because there is nothing to select.
- Choose What to do with the source schemebetween Keep active(leaves the source scheme active alongside the new one) and Slim down (archive the source)(deactivates the source scheme, deleting nothing).
- At the bottom, next to the button, a counter tells you how many requirements will be carried over ("N requirements will be carried over") or shows "No requirement will be carried over" if you chose Start from scratch. When you are ready press Apply migration. To go back without applying use < Back.

The four classes of areas

- To carry forward: areas already compliant and documented in the source scheme, which can be carried over as "to be reconfirmed". They are the only ones with a checkbox.

- Already aligned: areas whose target requirements are already compliant: nothing to do.
- New to assess: areas present in the target but not covered/compliant in the source: they must be assessed.
- Extra (source only): areas present only in the source scheme, the "extras": they stay in your file, they are not lost.

When an area ends up in "To carry forward"

- An area is proposed for transfer only if in the source scheme it is ENTIRELY compliant (excluding the requirements marked N/A) and has at least one attached proof. A single partial, non-compliant or unassessed requirement is enough for the area not to be proposed: the system never propagates a negative status from one scheme to another.
- Only the target requirements in that area that are still to be assessed are proposed: those already compliant or N/A are never touched.
- If the target marks that area with true critical requirements (KO for IFS, Fundamental for BRC, penalty-backed obligations for HACCP), a criticality badge appears next to the area. ISO/FSSC schemes have no critical requirements, so no badge.

What happens

- If you choose Carry forward the evidence, the requirements of the ticked areas are carried over to the target scheme marked as "Partial — to be reconfirmed" (never "Compliant"), and their proofs are copied (merged, without duplicates, with any already present in the target). In the outcome screen you see the green " Migration applied" box with the number of requirements carried over, any copied evidence and the number of areas applied.
- If you choose Start from scratch, the target scheme is activated but no requirement is carried over: the outcome screen states it neutrally ("You chose "Start from scratch"…, you will assess everything anew") and shows no misleading green "0 requirements carried over".
- If the areas were already aligned or there was no compliant evidence to carry forward, the outcome is equally neutral: "Migration recorded · [scheme] active" with the explanation of why nothing was carried over.
- If you chose Slim down, the source scheme is deactivated (as a status only, never through deletion): the data stays preserved in your file and you find it in the Scheme archive, reactivatable whenever you want. The outcome confirms it explicitly ("The scheme … has been archived — data preserved, reactivatable from the Scheme archive").
- Reapplying the SAME migration creates no noise: if a target requirement is already "Partial" with the same origin and there is no new evidence, it is skipped.
- After applying you can start another one with New migration.

After the migration: recheck the requirements

The outcome explicitly invites you to open the **Requirements**of the target scheme and review them one by one: the carried-over requirements are only "Partial — to be reconfirmed" and the confirmation of conformity remains yours, because the target scheme may be stricter and require additional evidence.

Scheme archive (history)

Below the wizard you find the **Scheme archive (history)**card: it lists the deactivated schemes that still hold data. Deactivation deletes nothing, so from here you can re-read the state of a discontinued certification (assessed requirements, number of audits, date of the last change) and reactivate it.

- For each archived scheme press » Reactivate.
- A confirmation request appears: "Reactivate [scheme]? It will return among the operational schemes with ALL the archived data. No information lost or duplicated." On confirmation, the scheme returns to operation with all its data.
- If you have no archived schemes with data you see the message "No archived scheme with data. When you deactivate a scheme you have already used, it appears here."

Signature and legal value

- The migration is recorded in the event log as a single append (append-only): nothing is overwritten or deleted.
- Note: this event is NOT part of the sealed SHA-256 integrity chain (today the seal covers only the operational records); this is stated explicitly in the event data. That is why, after the migration, manually re-reading the requirements is the step that gives value to the new certification.

Special cases

- No information is ever lost or duplicated: schemes are not deleted, at most archived and reactivated; the copied evidence is deduplicated, so it does not multiply.
- If you have only one scheme with data you cannot migrate yet: the tab shows only the message inviting you to assess the requirements of one scheme first.

Consultant Proposals (dual signature)

The **Consultant Proposals**are the changes to your self-monitoring Manual that your external consultant prepares and signs, and that come to you (the FBO) to be approved before entering your quality file. You find them in Quality > Certifications > **Consultant Proposals**, where each proposal concerns a single section of the Manual and is shown with its status (**pending**, **approved**, **discarded**or **withdrawn**).

Where it sits in the menu

The **Consultant Proposals**entry is not always present: it appears as a tab (chip) next to **Manual**, inside Quality > Certifications, only when you are the client and have actually received at least one proposal. Until a consultant has proposed changes to you, the tab is not shown.

How to tell whether you have proposals to handle

- When the tab is present, it carries next to its name a counter with the number of proposals still pending(proposals already handled are not counted in the badge).
- The same count also appears in the Dashboard, in the Quality section, as a reminder of the proposals to handle.

What it is for

The consultant works on your data but cannot modify the Manual on your behalf: they PROPOSE a change and sign it with the PIN of one of their own operators; you CONFIRM by signing with the PIN of one of your responsible operators. This is the dual-signature model: two distinct people, two distinct signatures, no change enters your file without your go-ahead.

How to do it

- Open Quality > Certifications and select the Consultant Proposalstab (next to Manual).
- At the top use the filters To handle(shows only the proposals still pending, with the number in brackets) and All(also shows the already-handled history). The » Refreshbutton reloads the list.
- Find the proposal: each row shows the icon , the title, the wording "Manual section ·" with the name of the section concerned and, if present, "· signed by" with the name of the consultant's operator who signed it.
- Press Reviewto open the detail (the button becomes Closeto collapse it again).
- If the consultant left an explanation, you read it in the Consultant's notebox.
- Under the heading Proposed changesyou see the word-by-word comparison between the current version of the section in your file and the proposed one. If the title is changed too, you find it under Title.
- Decide: press Approve and signto accept, or Discardto reject.

How to read the diff (the proposed changes)

- Text in red is what the consultant proposes to add or modify.
- Struck-through text is what they propose to remove.
- Text in gray stays unchanged.

This way you see exactly what would change compared with what is in your file today, without having to compare two texts by hand.

How to do it: approving and signing

- In the proposal's detail press Approve and sign.
- The Approve with PIN (RA/RGQ)box appears: in the dropdown select the responsible operator who signs and in the PINfield type their PIN (4 to 8 digits).
- Leave the Also formally approve the sectioncheckbox on if you want the section to enter already approved (signature included); untick it if you prefer it to enter as a draftto approve at a later time.
- Press Confirm and sign(during the operation the button shows " Signing…"). To cancel press Cancel.

What happens

- On confirmation, the change is applied to the Manual as a new revision of the section, your responsible operator's signature is recorded and the act is sealed into your certification chain. The three operations happen in a single atomic transaction: either they all succeed together, or nothing changes.
- The proposal moves to approvedstatus and stays in the history with the indication of who approved it (operator and role) and the reference to the sealed act.
- Only after this step does the consultant's change actually become part of your file: before that, it is only a pending proposal.

How to do it: discarding a proposal

- In the detail press Discard.
- In the Reason (recommended)field write why you are rejecting it (optional but recommended, so the reason stays on record).
- Press Confirm discard, or Cancelto go back.
- The proposal moves to discardedstatus: no change is applied to the Manual and the outcome (with the reason, if any) stays visible in the history.

Who can sign

Approving and signing requires an operator with an enabled role: Quality Manager, Self-monitoring Manager, Approver or Administrator (RA/RGQ). If no operator appears in the menu, you will see the notice " No operator with a PIN (responsible role) configured. Create an operator and set a PIN in **Settings > Operators**to be able to sign." The PIN is always verified server-side: no PIN is ever shown or stored in plain text.

Special cases

- If you enter a wrong PIN or the operator is locked, "Wrong PIN or operator locked." appears.
- If the chosen operator does not have a role enabled to approve, "This operator does not have a role enabled to approve (RA/RGQ required)." appears.
- If you don't select the operator or don't enter a valid PIN, "Select the RA/RGQ operator and enter the PIN." appears.
- If the proposal has already been handled in the meantime (for example by another responsible operator, or withdrawn by the consultant), the list realigns itself and the proposal no longer appears among those to handle.
- A proposal can also turn out withdrawn: it means the consultant cancelled it before you approved it. In that case there is nothing to do; it simply remains in the history.

Signature and legal value

The approval is a simple electronic signature: your identity (responsible operator) and the moment of signing are recorded, and the change is sealed into the certification chain of your file. This creates a verifiable trail of who proposed, who approved and when, protecting the documentary value of your self-monitoring Manual.

QUALITY & CERTIFICATIONS

Consultant access (delegation)

Lets the client (the FBO, food business operator) show their Quality file to an external consultant, always and only in READ-ONLY mode, in two distinct ways. You find it in Quality > Certifications > Settings, in two adjacent panels: **Send to HACCP consultant (expiring link)**for the snapshot, and **Consultant live access (delegation)**for real-time delegation. Both require a cloud account: in local mode the panels are not operational and show a notice (for delegation: "A cloud account (sign in) is required to invite a consultant."; for the snapshot: "Creating a link requires a cloud account (sign in). In local mode you can use the historical ZIP archive above.").

The two modes compared

- Snapshot (expiring link): a frozen copy of the quality file at a given date, shared through a secure link. The consultant opens it in the browser with no account and without seeing your live data; they verify its integrity on their own (signature + seal). Suited to a one-off review.
- Live access (delegation): the consultant works from THEIR own account on your always up-to-date data, read-only, and can only PROPOSE changes to you. You are the one who confirms the proposals: nothing enters the quality file without your signature. Suited to an ongoing collaboration.

How to — Snapshot (expiring link)

- Go to Quality > Certifications > Settings and locate the Send to HACCP consultant (expiring link)panel.
- In the Consultant name/referencefield type a label that helps you recognize the link (suggested placeholder: "e.g. Studio Rossi — June"). It is optional.
- In the Expirymenu choose the link duration: 7 days, 14 daysor 30 days(the default is 14).
- Press Create link. While it is being created the button shows "Creating…".
- A green panel appears, "Link created — copy it and send it to the consultant (you can only see it now):", with the expiry underneath ("Expires on …"): press Copyto copy the address to the clipboard (the message "Link copied to clipboard." appears) and send it to the consultant yourself (email, chat, however you prefer).
- Below, under Created links, you find every link you generated with its status (active, expired, revoked), the creation date, the expiry date and the number of times it was opened.

How to — Live access (delegation)

- In the same path Quality > Certifications > Settings, locate the Consultant live access (delegation)panel.
- In the Consultant emailfield enter the email address the consultant uses to sign in to KoreLab (field placeholder: "consulente@studio.it"). The Invitebutton stays disabled while the field is empty.
- Press Invite. During the operation the button shows "Inviting…".
- A green panel appears, "Invitation created for [email] — send this code to the consultant (you can only see it now):": it is an invitation code shown ONE time only. Press Copyto copy it ("Code copied to clipboard." appears) and send it to the consultant yourself.
- The consultant, from THEIR own account, activates the access like this: in Quality > Certifications, in the top bar Delegating clients:, they press + Accept invitation, paste the code into the "Paste the invitation code received from the client:" window and confirm. The message "Delegation accepted. You can now select the client from the list." appears. Until they do, the delegation shows as "pending".
- Below, in your panel, under Consultants with accessyou see the list with the email, the status (active, pending, revoked, expired), the invitation date, the acceptance date if any and the "read-only" indication.

What happens

- The invitation code (delegation) and the link (snapshot) are shown ONE time only, at creation: they are never shown again and cannot be recovered. If you lose them, create a new one.
- KoreLab does not send anything on your behalf: you are the one who sends the link or the code to the consultant. The email only serves to bind the invitation to that consultant.
- For delegation, upon acceptance the system checks that the email of the consultant's account matches the one in the invitation: only that consultant can accept (otherwise the app shows "Invalid or expired invitation").

- Once the delegation is accepted, the consultant picks your name from the Delegating clients:menu (the default option is "— My data —") and sees your always up-to-date data, but read-only: a yellow banner appears at the top, "Read-only — client data …". They can consult and PROPOSE; they cannot write or sign in your place.
- The snapshot, by contrast, is an immutable photograph as of the creation date: even if you change the quality file afterwards, the consultant keeps seeing the copy from that moment.

How to revoke

- For delegation: in the Consultant live access (delegation)panel, on the row of the consultant in "active" or "pending" status, press Revoke. The confirmation "Revoke this consultant's access? They will no longer be able to see your data." appears; upon confirming, the status changes to "revoked".
- For the snapshot: in the Send to HACCP consultant (expiring link)panel, on the row of the "active" link, press Revoke. The confirmation "Revoke this link? The consultant will no longer be able to open it. Any copies already downloaded remain in their possession." appears; upon confirming, the link can no longer be opened.
- The delegation can be revoked either by you (the client) or by the consultant, and it takes effect immediately.

Read-only — why it really is

- Consultant access is read-only by design, on two levels: the app shows them no write command on your data, and the database itself blocks any write coming from them (the data-access rules only allow reading the quality file delegated to them).
- The only "active" action the consultant can take is PROPOSING changes: the proposal comes to you and becomes effective only after your confirmation and your signature. The consultant cannot apply anything on their own.

Proposals (related to delegation)

- Working read-only on the Manual, the consultant signs their proposal with the PIN of one of their own operators (from their own tenant) and sends it to you. They find their proposals in the My proposalssub-tab.
- For you (the client), proposals arrive in the Consultant proposalssub-tab (with a counter of the proposals still to be processed). There you can see the proposed text highlighted, then press Approve and signor Discard.
- If you approve: in the Approve with PIN (RA/RGQ)panel you select an operator with a PIN (quality manager / self-monitoring manager / approver / admin role), type the PIN, optionally tick "Also formally approve the section" (otherwise the change enters as a draft to approve later) and press Confirm and sign. Only then does the change enter your quality file, sealed.

Signature and legal value

- Every record that enters the quality file remains signed by you (the FBO): signatures are collected by selecting an operator with an active PIN from the Sign with PINpanel (for approving proposals it is labelled Approve with PIN (RA/RGQ)) and typing the PIN (4–8 digits). If you have no operators with a PIN configured, the notice "No operator with a PIN configured. Create an operator and set a PIN in Settings > Operators to be able to sign." appears. The signing operators are those of YOUR account.
- Signatures are simple electronic signatures (PIN), not qualified ones. Responsibility for food safety and every signature always remain with the FBO, even when a consultant assists you.
- The snapshot is evidence with internal evidentiary value (an immutable photograph), not a certification.

Legal basis (GDPR)

- When you grant live access, the consultant acts as a data sub-processor under Art. 28 GDPR, designated by you. Access is read-only and you can revoke it at any time.

Special cases

- Local mode: neither of the two features is available without a cloud account. To hand something to the consultant anyway you can use, higher up on the same page, the Historical archive (10-year ZIP)to deliver by hand.
- Lost link or invitation: there is no way to view it again. Create a new link or a new invitation and, if needed, revoke the previous one.
- Multiple consultants: you can invite several; each has their own row in Consultants with accessand is revoked individually.
- Revoking the snapshot after download: revocation blocks new openings of the link, but any copies the consultant has already downloaded remain in their possession.

Plan note

- Consultant access (snapshot and delegation) is part of the Certifications module and requires an active cloud account. If the panels are not operational, check that you are signed in and that your plan includes the Certifications module.
- The Delegating clients:menu and the My proposalssub-tab appear only for those on a Consultant plan; on the client (FBO) side, a cloud account and the Certifications module are all that is needed to receive and manage proposals.

For the HACCP consultant

This guide is for those on the **Consultant**plan who follow several client companies from the same account. Everything happens inside the **Quality > Certifications**module: at the top of the module a **Delegating clients**bar appears, from which you accept invitations, choose which client to work on and propose changes to their self-monitoring manual. On the client's quality file you always work read-only: you view and propose, the company (the FBO) approves and signs.

How to — accept an invitation

- Open Quality > Certifications. Below the title you find the light-blue bar starting with Delegating clients:.
- Have the client send you the invitation code: they generate it from their own account and share it with you (the code is valid once, until the expiry they set).
- Press the + Accept invitationbutton.
- A small system window opens with the request Paste the invitation code received from the client:— paste the code and confirm.
- If the code is valid the message Delegation accepted. You can now select the client from the list.appears and the client enters the drop-down menu. If it is expired or wrong you read Invalid or expired invitation: ask the client to regenerate it.

How to — select a client and work on their file

- In the Delegating clientsbar open the drop-down menu.
- The — My data —entry is your personal file; below it you find one option per client (their company name, or a short label such as Client · <code>…if the company name is not filled in yet).
- Select the client: the module reloads their data and at the top the yellow banner Read-only — client data [name]. Changes remain with the FBO; you view and propose.appears.
- Browse their sub-tabs as you would on your own: Overview, Requirements, Manual, Audit & verifications, Non-conformities, ð Deadlines, Migration, Settings. Everything can be consulted, nothing can be edited directly.

How to — propose a change to the Manual

- With the client selected, open the Manualsub-tab and enter the section you want to revise.
- Edit the section blocks freely: you are working on a local draft, not on the client's file.
- As soon as you touch something, at the bottom of the editor the Propose changebutton appears (in a delegated context there is no Save sectionbutton: you cannot save, only propose).
- Press it: the Propose this change to [client name]panel opens.
- Fill in the optional fields Proposal title (optional)and Note for the FBO — why this change (optional)(e.g. procedure update after the audit).
- In the Sign the proposal with your PINblock choose your operator in the — select operator —menu and type the PIN(4 to 8 digits).
- Press Send signed proposal. To cancel without sending use Cancel. On successful sending Proposal sent to the clientappears.

How to — track your proposals and return to your own data

- While working on a client, next to Manualthe My proposalssub-tab appears: it lists the changes you sent to that client, with the status (pending / approved / discarded / withdrawn) and the outcome.
- A proposal still pendingcan be cancelled with the Withdrawbutton on its row (you are asked for confirmation; afterwards, the client will no longer see it among those awaiting approval). Use » Refreshto reload the list.
- To leave the client's file, reopen the Delegating clientsdrop-down menu and choose — My data —: the read-only banner disappears and you go back to working on your own account.

What happens

- When you accept an invitation, KoreLab records a read-only delegation: you see the client's data but cannot write it directly.
- The change you propose from the Manual is not savedto the client's file: it leaves as a signed proposalwith your PIN and lands in the client's queue.
- On the client side, the FBO opens the Consultant proposalssub-tab, presses Reviewand sees the block-by-block comparison between the current version and the one you propose (red = added/changed, struck through = removed, grey = unchanged), together

with your note.
• If the FBO approves, they sign with the PIN of a responsible operator (RA/RGQ) via Approve and sign > Confirm and sign: only then does the change enter the client's Manual, sealed in the quality file. In the same panel the FBO has the Also formally approve the sectioncheckbox: if they leave it on, the new version enters as Approved(signature included); if they remove it, it enters as a draftto approve later. If they refuse, they use Discardwith a reason.
• When one of your proposals is approved, in My proposalsthe row shows Approved and applied to the client's file; if it is discarded it shows Discardedwith the FBO's reason, if any.
• When you leave the Certifications module the context always returns to your own data: the archives do not stay pointed at the client.

Special cases

• If in the signature block you read No operator with a PIN configured, you have no operators enabled to sign: create an operator and set a PIN in Settings > Operators(on YOUR account, not the client's), then go back to proposing.
• If you try to send a proposal without having chosen a client you read No client selected: go back to the bar and select a client.
• If the PIN is wrong or the operator is locked you read Wrong PIN or locked operator: check your operator's credentials.
• If in the meantime the client has revoked the delegation or let it expire you read The delegation to this client is no longer active: ask for a new invitation.
• If the client does not have (or no longer has) an active Certifications subscription you read The client does not have an active certifications subscription: you cannot propose until they reactivate it.
• Revoking the delegation can be initiated by the client or by you; once revoked, the client disappears from your Delegating clientsmenu.

Plan notes

• The Consultantplan (€39/month, €390/year) is designed for those assisting several companies: it enables the full Quality / Certificationssuite plus the master data the certification refers to (product catalog, production, recipes and bills of materials).
• It is the only plan with the multi-client role: only here do the Delegating clientsbar and the propose > confirm flow appear.
• It does not include the commercial part (prices, price lists, margins) nor the artificial intelligence features: for that client content the FBO uses their own account.
• No count limits on clients, products, recipes, suppliers and bills of materials.

Signature and legal value

• The proposal carries your electronic signature with PIN (simple electronic signature): it documents who proposed the change and when.
• The change enters the client's file only after the FBO's approval and signature with the PIN of a responsible operator (self-monitoring manager or quality manager): the dual signature clearly separates who proposes (the consultant) from who decides and takes on responsibility (the company).
• Responsibility for food safety always remains with the FBO: KoreLab produces traced evidence with internal evidentiary value; it does not replace a certification nor qualified eIDAS/QES signatures.

My proposals (consultant)

The **My proposals**section is your desk as a consultant: it gathers all the changes to the self-monitoring manual you have sent to the client you are following, with their status (pending, approved, discarded, withdrawn) and the outcome. It is a sub-tab that appears next to **Manual**inside the Certifications module, and you only see it while you are working in a client's context (delegated access). The client's name appears in the title, next to " My proposals".

The proposal is the heart of delegated access: you never write directly into the client's quality file; instead you propose a signed change. It will be the client's FBO who approves it and lets it enter their own Manual.

Where to find it

- Enter Quality > Certifications.
- At the top, under Delegating clients, select from the drop-down menu the client you want to follow (if you choose "— My data —" you are not in a delegated context and the proposals tab does not appear).
- When you are on the client, a yellow banner Read-only — client data [name]appears and among the sub-tabs, next to Manual, My proposalsappears.

Where the proposal is created

The proposal is NOT created from this screen: here you only track it. Creation happens inside the client's **Manual**, with the **Propose change**button.

How to (create and sign a proposal)

- Check that you are in the right client's context: the Read-only — client data [name]banner must be there.
- Open the Manualsub-tab and go to the section you want to change.
- Edit the text of the section blocks as you would propose it. As soon as you touch something, at the bottom of the section the purple Propose changebutton appears (it only appears when you have changes not yet sent and you are in a delegated context).
- Press Propose change: a purple panel opens below the section, titled Propose this change to [client name].
- If you wish, fill in Proposal title (optional)and Note for the FBO — why this change (optional). Both are optional: if you leave the title empty, the section title is used.
- In the Sign the proposal with your PINpanel select the signing operator: an operator of YOUR practice, active and with a PIN set (only your operators enabled to sign are shown).
- Type the PIN: it must be 4 to 8 digits.
- Press Send signed proposal(while sending, the button turns into " Sending…"). To close without sending use Cancel.

What happens after sending

- The proposal appears in My proposalswith the yellow "pending" badge.
- The client receives it in their Consultant proposalsqueue and sees a notice with the number of proposals still to be processed.
- Only the client's FBO can approve it, and they do so by signing in turn with the PIN of their responsible operators (Quality Manager / Self-monitoring Manager / approver / admin). This is the dual-signature model: first you sign, then the FBO signs.
- As long as only your signature is there, the change is NOT yet in the client's file: it enters only when the FBO approves.

How to track the status

Each proposal is a row with an icon , the proposal title (or the section title, if you did not set one) and, underneath, the reference "Manual section · [section title]". On the right a coloured badge indicates the status:

- "pending" (yellow badge): signed by you, in the client's queue, still to be decided.
- "approved" (green badge): the FBO accepted and signed it. Underneath, " Approved and applied to the client's file." appears.
- "discarded" (red badge): the FBO refused it. Underneath, " Discarded" appears, followed by the reason note, if the FBO left one.
- "withdrawn" (grey badge): you withdrew it yourself before it was decided.

To reload the list with the latest updates press ›**Refresh**at the top right: the most recent proposals appear first.

How to (withdraw a proposal)

- Find in the list the proposal you want to cancel: it must still be "pending".
- Press the Withdrawbutton on the row (it appears only for pending proposals).
- Confirm at the question "Withdraw this proposal? The client will no longer see it among those awaiting approval."

What happens when you withdraw

- The proposal moves to the "withdrawn" status (grey badge) and disappears from the client's approval queue.
- The Withdrawbutton is no longer available: a proposal already approved, discarded or withdrawn cannot be withdrawn.

Special cases

- If you have not sent anything yet, the screen shows No proposals sentand reminds you to open the Manual, edit a section and use Propose changeto send your first signed proposal.
- If at signing time you have no operator with a PIN, instead of the selector the notice " No operator with a PIN configured" appears: create an operator and set a PIN in Settings > Operatorsto be able to sign.
- If you select the operator or the PIN incompletely, sending is blocked with the message "Select your operator and enter the PIN."
- If the PIN is wrong or the operator is locked, "Wrong PIN or locked operator." appears.
- If the delegation to that client is no longer active, "The delegation to this client is no longer active." appears; if the client does not have an active certifications subscription, "The client does not have an active certifications subscription." appears.
- If the proposal is discarded and you want to resubmit it, you do not reactivate it: open the Manual again, redo the change (taking the FBO's note into account) and send a new proposal with Propose change.
- A proposal already "approved" or "discarded" stays in the list as history, but can no longer be edited or withdrawn.

Signature and legal value

- The proposal is born already signed by you at the moment of sending: the signature uses the operators of YOUR practice with an active PIN, not the client's. This holds even while you are looking at the client's data: you always sign with your own operators.
- Approval requires a second signature, the FBO's, with the PIN of their responsible operators (Quality Manager / Self-monitoring Manager / approver / admin).
- Only with this dual signature does the change enter the client's file, where it is applied as a new revision of the Manual and sealed. This is what gives the change traceability and signature value.

Plan notes

Proposals are part of delegated access on the consultant side: you work on the data of the client you are following (single source = the client's data) and every intervention always goes through the "propose > the FBO confirms" mechanism, so formal responsibility remains with the client.

Operator tests & Handout (HACCP training)

The **Operator tests**section is how you, on the **Consultant**plan, give the operators of your clients a multiple-choice HACCP training test and send them the **handout**to study beforehand. You find it in Quality > **Operator tests**(the entry only appears on the Consultant account). Everything happens under delegation on a client: you select the client at the top, collect the operators' privacy consent, send the handout and the test by email, and read the results with automatic grading. At the end you can let the result enter the client's file as a training session (with your signature and the company's approval).

The language (Italian or English)follows the language set in **Settings > Language**: with the app in English, the emails to operators, the portal where they take the test, the questions and the handout are in English; with the app in Italian, in Italian.

First of all: selecting the client

- Open Quality > Operator tests. If you have no active delegations, the page explains it: ask a client to delegate you (Quality > Delegations).
- At the top, in the Client (delegation)menu, choose the company you want to work on. From here four tabs appear: Operators & consent, Handout, New test, Results.

Step 1 — Operators & consent (GDPR)

The client's operators come from the **Operators**registry of their file. To be able to send them the handout and the test you need their **email**and their **consent**to the processing of their data.

- In the Operators & consenttab, press Contactson an operator's row to open the email, phone and address fields.
- Press Save contactssto store them, or Request GDPR consentto save them and immediately send the operator an email with a personal link to the consent page.
- The label next to the name shows the status: Consent needed, Consent pending(email sent, not yet accepted), Consent ok(accepted) or Consent revoked.
- The operator opens the link, reads the notice and gives (or refuses) consent on their own, with no account needed. Only operators with Consent okcan receive a test.

Step 2 — Training handout

The handout is the study material (5 illustrated topics) to send **before**the test.

- In the Handouttab press Download previewto view the PDF.
- Tick the operators (with email) to send it to and press Send handout: each receives it as a PDF attachment by email.

Step 3 — New test

- In the New testtab give a Title(optional, e.g. "Annual HACCP test 2026").
- Set the number of questions, the pass threshold %and the time (min)(0 = no limit).
- Tick the operators to send it to: only those with accepted GDPR consentappear.
- Press Create & send: KoreLab generates a personal, private linkfor each operator and emails it to them. Questions are drawn at random from the bank and the order of the answers is shuffled per operator (anti-copying). The test opens on a dedicated pageby opening the link (no account needed): the link is personal, protected by an unguessable token and expiring — it is neither indexed nor discoverable.

Step 4 — Results

- In the Resultstab you find the tests created, with each operator's status (Sent, In progress, Passed/Not passedwith score and percentage).
- Press Detailto see the question-by-question correction (your answer, the correct one and the explanation).
- For those who passed, press Certificateto download the branded PDF certificate.
- If a test is no longer needed, press Revoke: all the links of that send stop working.

Grading is always server-side

The correct answers never leave the operator's device: the test they download does NOT contain the solutions, and the score is computed by the server. The correction (with the right answers) is shown to them only AFTER they submit the test, as formative feedback.

Letting the result enter the client's file (Confirm in Training)

A test taken by the operators is, to all effects, a training session. To record it in the client's file:

- In the Resultstab, under a test with at least one operator who completed it, press Confirm in Training.
- Sign with the PINof one of your operators (as for the other proposals): a training-session proposal is sent to the company.
- It will be the FBO(the company) who approves it and records it in their own file, where it feeds the competences matrixand the 24-month refresher deadline (see the Training & competencesguide). It is the same "propose > confirm" model as the other proposals: nothing enters the client's file without their approval.

Special cases

- If an operator has no email, you cannot send them the handout or the test: add it in Operators & consent.
- If no operator has consent, creating the test flags it: go through the consent request first.
- The test link is personal and expiring; reopening it, the operator finds the sametest (questions and order frozen), not a new one.

Signature and legal value

- The certificate documents a non-proctoredknowledge test, taken remotely under the operator's self-declaration of responsibility, with automatic grading recorded electronically. It is not a qualified certification nor a legally binding qualification: keep it together with the company training records.
- The session enters the client's file only with the dual signature (you propose with your PIN, the FBO approves with theirs): responsibility for training remains with the company.

Plan notes

It is a feature of the **Consultant**account and works on the operators of the clients who delegated you. It relies on the client's **Operators**registry and links to the **Training & competences**module of their file.

Complaints & trend analysis

The Complaints module records the complaints you receive (from a customer, consumer or authority), classifies them by category and source, reads their **trend analysis**over time and links each complaint to two operational actions: simulating the **upstream recall**of the lot involved and opening a **Non-Conformity (CAPA)**. You find it in Quality > **Complaints**. It is the safeguard for the complaint-management requirement (Reg. (EC) 178/2002 Art. 19 · IFS 5.8 · BRCGS 3.10).

At the top there are two tabs: **Complaints list**(record and consult individual complaints) and **Trend analysis**(the aggregated numbers by category and by month).

How to — record a complaint

- Open Quality > Complaintsand stay on the Complaints listtab.
- Press + New complaint(top right; it turns into × Cancelto close without saving).
- Choose the Sourceamong Customer, Consumerand Authority(the default is Customer).
- Choose the Categoryamong Foreign body, Sensory, Microbiological, Labelling, Packagingand Other(the default is Foreign body).
- If the complaint concerns a lot, select it in the FP lot involved (opt.)field: the list shows the finished product lots present in the Warehouse (lot code · product). It is optional, but linking it enables the upstream recall simulation.
- Fill in the Description *(required): what was reported.
- If you wish, write in the Action / response (opt.)field how you handled the complaint.
- Press Record complaint(it stays disabled while the description is empty).

How to — filter and read complaints

- Use Search description / action…to filter by text (description, action, source).
- Narrow down with the All categoriesand All sourcesmenus.
- Next to the filters, if there are NCs born from complaints, a reminder like "· N complaint NCs open/historical" appears.
- Each complaint is a card with a category-coloured border, the category label, the source and date, the description and (if present) the action and the linked FP lot.

How to — simulate the upstream recall

- On a complaint with a linked FP lot, press Simulate recall.
- KoreLab traces back through the Warehouse traceability: from the finished product lot to the raw material lots consumed, up to the shipments, and shows you the Upstream recallpanel with the raw material lots involved and the list of Customers to notifywith the quantities.
- If there is no upstream traceability (or the Warehouse is not loaded) "No upstream traceability for this lot (or warehouse not loaded)." appears; if the product has not been shipped yet, "No linked shipment: product still in the warehouse.".

How to — open an NC from the complaint

- Press Open NCon the complaint card.
- Confirm at the request "Open a new Non-Conformity (CAPA) from this complaint? You will manage it in the Non-conformities tab.".
- KoreLab creates an NC with origin = complaint, already filled in with the complaint description and — if you have an active IFS or BRCGS scheme — with the requirement reference (5.8 for IFS, 3.10 for BRCGS). " NC opened (complaint origin) — manage it in the Non-conformities tab." appears and the button turns into NC opened.
- From then on you manage the NC in the Non-conformitiestab like any other (immediate correction, root cause, corrective action, owner, deadline and effectiveness check).

Trend analysis

In the **Trend analysis**tab you find three indicators (**Total complaints**, **Last 30 days**, **Complaint NCs**), a **By category**chart and the **Monthly trend (last 12 months)**. The **Trends PDF**button exports the picture to a document. If you have not recorded any complaints yet, "No data: record some complaints to see the trends." appears. Reading the trends helps you spot recurring categories and document the complaint monitoring required by the standards.

What happens to the data

- Complaints are written to the quality file's append-only register: they are added, not overwritten. The complaint date is the recording date.
- The recall simulation reuses the Warehouse traceability: the more you keep production and shipments up to date, the more complete the upstream recall.

Special cases

- In delegated access mode (you are consulting a client's data read-only) you can read complaints and trends, but not record new ones, simulate recalls or open NCs.
- Linking the FP lot is optional: without a lot the complaint remains valid, but you cannot simulate the upstream recall.

Plan notes

The Complaints module is part of the **Quality**suite and relies on the Registers and Warehouse modules: the upstream recall requires traceability data in the Warehouse, while opening the NC feeds the CAPA register of the Non-conformities module.

Training & competencies

The Training & competencies module keeps the **competence matrix**(each staff member's training status) and the per-person archive of **certificates**. You find it in Quality > **Training**. Staff training must be refreshed periodically: KoreLab uses a **24-month**interval and flags who is due or overdue, also feeding the Deadlines module. References: IFS 3.1/3.3 · BRCGS 7.1 · Reg. (EC) 852/2004 Annex II Ch. XII.

At the top there are two tabs: **Competence matrix**(the status per staff member) and **Recorded sessions**(the list of trainings held, where you record new ones).

How the matrix works

The matrix builds itself by crossing the **Operators**in the master data with the recorded **training sessions**: for each active staff member it counts the sessions they attended, finds the latest training and calculates the next due date (latest + 24 months). You do not have to fill it in by hand: just keep the operators up to date (in the Operators tab) and record the sessions.

How to read the competence matrix

- Open Quality > Trainingand stay on the Competence matrixtab.
- At the top, four indicators: Staff(total in the master data), Trained(with at least one session), Due soonand Overdue / never.
- Below, one row per staff member with a coloured status label: green when the refresh is valid, yellow due soon(within 30 days), red overdue, and Never trainedfor those with no sessions. Each row shows role, number of sessions, date of the Latesttraining and of the Nextdue date (with the days remaining or elapsed).
- If the sessions mention participant names that are not in the Operators master data, at the bottom you find a notice listing them, so you can add them to the Operators tab and include them in the matrix.

How to — attach a staff member's certificates

- On the staff member's row press Certificates(it turns into × Close).
- The document upload area dedicated to that person opens: choose the certificate file (PDF/JPG/PNG/WebP up to 2 MB), fill in Version, Date added, Expiry dateand Notesas needed, then press Upload document.
- The certificate stays archived privately and reopens with Open(expiring link). If you set an Expiry date, KoreLab creates a renewal reminder in the Deadlines module.

How to — record a training session

- Go to the Recorded sessionstab and press + New session(it turns into × Cancel).
- Fill in the Topic *(e.g. personal hygiene, HACCP, allergens) and the Session date(it cannot be in the future).
- If you wish, fill in Trainer / sourceand Duration (hours).
- Choose the Participants *: press the buttons with the names of the operators in the master data to select them (the button lights up when active) and/or write other free-text names in the Other participantsfield (comma-separated).
- Tick Effectiveness check passedif the training was verified with a positive outcome.
- Press Record session(it stays disabled while the topic or the participants are missing).

What happens

- Each session is written to the quality file's append-only register: it is added, not overwritten. The list shows topic, date, duration, participants, trainer and the outcome of the effectiveness check.
- The session-to-person matching is done by name: KoreLab recognizes the operator among the participants even when the name is written with some additions (e.g. "Mario Rossi (shift A)"). Writing names consistently with the master data makes the matrix more accurate.
- As soon as you record a session, the matrix and the due dates recalculate: the latest training of those who attended is updated and the next due date moves forward by 24 months.

Special cases

- If you have no operators in the master data, the matrix is empty: add your staff in the Operatorstab to build it. In the session form, in the absence of operators, write the names in the free-text field.
- In delegated access (a client's data, read-only) you can consult matrix, sessions and certificates, but not record sessions nor upload or delete certificates.
- Certificates are saved on Supabase Storage and require a cloud account: in local mode the certificates area does not upload files.

Plan notes

The module is part of the **Quality**suite and relies on the **Operators**master data (for the matrix) and on the **Deadlines**module (for the 24-month refresh and for certificate expiry dates). Certificates reuse the same document archive as the Documents & attachments module.

Management review

The Management review automatically gathers the system data (compliance per scheme, non-conformities, deadlines, calibrations and equipment, audit outcomes) and freezes it in **signed minutes**, signed with a PIN and sealed into the quality file's integrity chain. You find it in Quality > **Management review**. It is a cornerstone document of management systems: ISO 9001 §9.3 · IFS 1.4 · BRCGS 1.1.4.

The automatic summary

In the first card, **System summary (automatic data)**, KoreLab shows — without you filling in anything — the up-to-date picture of the system:

- a card for each active standard with the compliance percentage (compliant out of applicable requirements) and any critical NCs;
- the open NCs(with the breakdown by origin: from audits, internal, from complaints);
- the deadlinesoverdue and due within 30 days, with the list of the nearest ones;
- the equipmentwith overdue calibration or maintenance;
- the recent audits(the latest ones, with date and outcome).

This summary is the snapshot that gets attached and frozen in the minutes: it represents the review inputs.

How to — record the signed minutes

- Open Quality > Management reviewand read the automatic summary at the top.
- In the Record the review (signed minutes)card fill in the Reference period(e.g. year 2026, 2nd half…).
- Write in the large field the review outcomes, the decisions and the actions of Management: adequacy of resources, objectives, actions on recurring NCs, changes affecting the system, improvement opportunities.
- In the Review signature (Management / RGQ)panel select the signing operator and type their PIN(4–8 digits).
- Press Record and sign the review.

The local draft

While you write, KoreLab automatically saves a **draft**of the period and the text on this device (it is not yet signed nor sealed): if you close and reopen, you find it again and the **Draft restored**notice appears. You can force saving with **Save draft**or delete it with **Discard draft**. When you sign the review, the local draft is removed because it is no longer needed.

What happens

- Upon signing, KoreLab verifies the PIN on the server, records the minutes with the signer's name and sealsthem into the integrity chain (SHA-256): " Review recorded and signed by … (SHA-256 sealed)." appears.
- The minutes enter the Recorded reviewshistory, with date, period, signer's name and the * sealeddot. From there you can reprint them as a PDF with PDF.
- Reviews are append-only: each one photographs the system data at the moment of signing and is never overwritten.

Special cases

- If you have no active standards, the summary invites you to activate a certification to populate the review.
- If the decisions text, the signer or a valid PIN is missing, signing is blocked with a message telling you what to complete.
- If the PIN is wrong or the operator is locked, the signature does not go through.
- In delegated access (a client's data, read-only) you can consult the summary and the reviews already signed, but the minutes are signed by the owning FBO from their own account: recording is blocked here.

Signature and legal value

- The signature is a simple electronic signature with PIN, verified server-side: it ties the minutes to the signer (Management / RGQ) and to the moment of signing.

- The SHA-256 seal makes the minutes verifiable link by link in the quality file's integrity chain (with a cloud account). They remain evidence with internal evidentiary value, not a certification.

Plan notes

The module is part of the **Quality**suite. PIN signing and sealing require a cloud account and at least one operator with a PIN configured in the **Operators**tab.

Documents & attachments

The Documents & attachments module is the archive of your quality system's expiring documents: training certificates, supplier and raw material technical data sheets, packaging declarations of conformity (MOCA, food contact materials). You find it in Quality > **Documents**. Each document carries a version and dates; the **expiry date**generates a renewal reminder in the Deadlines module. Files (up to 2 MB) are archived privately and downloaded through an expiring link.

How to — upload a document

- Open Quality > Documents.
- In the upload panel choose the Document type: Training certificate, Supplier technical data sheet, Raw material technical data sheetor MOCA / packaging DoC technical data sheet.
- If you wish, fill in the Version(e.g. rev. 3 / 2026) and the Date added(preset to today).
- Set the Expiry date (> reminder)if the document expires (certificate, DoC, training certificate): this is where the renewal reminder in the Deadlines module comes from.
- Add any Notes.
- Choose the file (PDF, JPG, PNG or WebP) and press Upload document. On success " Document uploaded." appears.

How to — open or delete a document

- Each document is a row with the name, the version if any, the type, the size and the expiry status (green border if valid, yellow if expiring within 30 days, red if EXPIRED).
- Press Opento download/view it through a secure expiring link (signed URL).
- Press to delete it: confirmation is requested because the operation cannot be undone.

What happens to the files

- Documents are saved to a private storage space (Supabase Storage), accessible only from your account: nobody else sees them.
- Upon upload KoreLab checks that the file content really matches the declared type ("magic bytes" check): a corrupted or disguised file is rejected with "The file content does not match the declared type (invalid or corrupted file).".
- Download ALWAYS happens through an expiring link: files have no permanent public address.
- The limits are: maximum 2 MBper file ("File too large: 2 MB maximum.") and only PDF/JPG/PNG/WebP formats ("Format not allowed: only PDF, JPG, PNG or WebP.").

The same archive, also per-entity

This same upload tool is reused elsewhere in the app, already "hooked" to a person or a master data record: the **certificates**in the Training matrix (per staff member) and the attachments of the **supplier**and **MOCA**sheets in the Assessments module. Documents uploaded there are of the same type and follow the same rules (2 MB, expiry > Deadlines, download via signed URL).

Special cases

- The document archive requires a cloud account (Storage is a cloud feature): in local mode uploading is not available.
- In delegated access (a client's data, read-only) you can consult and open documents, but not upload or delete them.

Plan notes

The module is part of the **Quality**suite. Document expiry dates feed the **Deadlines**module (document deadlines section), so renewals of training certificates, certificates and DoCs do not slip through.

Scheduled internal audits

The Scheduled internal audits module lets you plan and carry out the internal verifications of your system: you schedule audits by area, run a checklist built on the real requirements of the active standards and record a **report signed**with a PIN and sealed; every finding marked as "NC" automatically opens a non-conformity in the CAPA register. You find it in Quality > **Internal audits**. It is a management system requirement: ISO 9001/22000 §9.2 · IFS 5.1 · BRCGS 3.4 (plus the periodic verification of self-monitoring under Reg. (EC) 852/2004). It is different from the **Audit & verifications**tab inside Certifications, which instead concerns the third-party audit by the certification body (IFS score, BRCGS grade, ISO cycle).

The module's three tabs

- Program— the annual planning and the coverage map of the areas.
- Perform audit— the checklist on the real requirements and the signing of the report.
- Reports— the history of sealed reports, with PDF printing.

Program — area coverage

At the top of the Program tab, the **Area coverage**card shows, for each auditable area/process (the thematic areas of the active standards), how many items it contains, the **last audit**performed, the **next**one due (= last + frequency) and the **status**(Never audited, Overdue, Due soon, OK). At the top right a label sums up how many areas are still to be audited, so you cover everything at least once a year.

How to — plan an audit

- Open Quality > Internal audits> Programtab.
- Press + Plan audit.
- Choose the Area / processfrom the menu, fill in the Planned date, the Assigned auditor, the Frequency (months)(preset to 12) and any Notes.
- Press Plan: the audit appears in the Planned auditslist, with the date coloured according to the due date.

To cancel a planned audit use the ****icon on the row: it is not actually deleted but reversed (it stays traced in the append-only history).

How to — perform an audit and sign the report

- Go to the Perform audittab.
- Choose the Area / process: KoreLab builds the checklistby taking the real requirements of that area for each active standard (grouped by standard). Fill in the Audit dateand the Auditor.
- For each checklist item choose the outcome: Compliant(default), Observation(improvement hint) or NC(missing requirement). For Observation and NC a field appears where you describe the finding. flags a critical requirement (KO/Fundamental).
- Write the Auditor's conclusionsin the large field (overall assessment, required actions, timing).
- In the Report signature (Auditor / RGQ)panel select the signer and type the PIN(4–8 digits).
- Press Record and sign the report.

What happens

- At the top you always see the real-time tally (compliant · observations · NC) and the report's overall outcome(Compliant, Compliant with observations, Non-compliant).
- Upon signing, KoreLab verifies the PIN on the server, records the report with the signer's name and sealsit into the integrity chain (SHA-256).
- CAPA closed loop: every item marked "NC" automatically opens a real non-conformity in the register (origin "from audit"), with the clause reference and the finding description. The final message tells you how many NCs were opened. You then manage them in the Non-conformitiestab.
- The report enters the Reportshistory with date, area, outcome, signer, number of NCs and the * sealeddot; from there you reprint it as a PDF.

Special cases

- If you have no active standards, the areas are empty: activate a certification to populate program and checklist.
- If no requirement is mapped for an area among the active standards, the checklist is empty and cannot be signed.
- The signer and a valid PIN are required: without them, signing is blocked with a message; if the PIN is wrong or the operator is locked, it does not go through.
- In delegated access (a client's data, read-only) you can consult program and reports, but planning and the report are signed by the owning FBO from their own account.

Signature and legal value

- The signature is a simple electronic signature with PIN, verified server-side and bound to that specific report (type and content): it is not a qualified signature.
- The SHA-256 seal makes the report verifiable link by link in the quality file's integrity chain (with a cloud account). It remains evidence with internal evidentiary value, not a certification.

Plan notes

The module is part of the **Quality**suite. PIN signing and sealing require a cloud account and at least one operator with a PIN configured in the **Operators**tab. Planned dates and coverage deadlines help you not skip any area over the course of the year.

Organization chart & responsibilities

The Organization chart module structures the company's roles and responsibilities: who does what, duties, deputies and the assignment of responsibilities by area of the quality system. It is evidence required by the standards (defined roles and responsibilities: IFS 1.2 · BRCGS 1.1 · ISO 9001/22000 §5.3) and used to be just text in the Manual; it is now a dedicated module linked to the Operators master data. You find it in Quality > **Organization chart**.

What it contains

- The organization's roles/functions(e.g. Management, Quality Manager/RGQ, Self-monitoring Manager, Production, Warehouse…), each with the assigned person(from the Operators master data), an optional deputy, the appointment date and notes.
- The assignment of responsibilities by areaof the system (who answers for a given area of requirements).

How to — add a role

- Open Quality > Organization chartand press + New role.
- Fill in the title/function, choose the person(operator) and optional deputy, the appointment date and the notes.
- Save: the role enters the organization chart and is available as evidence in the quality file and in the certification PDFs.

What happens

- Operators are loaded from the cloud (the same master data as the Operators tab): the organization chart stays aligned with who is actually in the company.
- It fills in the "roles and responsibilities" evidence that auditors request and the Manual refers to.

Special cases

- In delegated access (a consultant on a client's data) the organization chart can be consulted; changes are handled by the owning FBO.

Plan notes

It is part of the **Quality**suite (Pro, Quality, Consultant plans, or the Certifications add-on).

ACCOUNT

Your data on this device

KoreLab keeps a copy of your data on the device so you can work **offline**too: the catalog, the Quality modules and the changes you make while the network is down. That copy is **yours, and separate from that of anyone else**using the same computer or tablet.

Several accounts on the same device

On a shared computer — the office workstation, the tablet in the lab, the machine that changes hands — different people sign in with different accounts. Each one sees **only their own data**: whoever comes after you cannot see yours or delete it, and you cannot see theirs.

Changes made **offline**stay with whoever made them. If you sign out before they have been sent, they are not lost: they wait there, and go out on their own when that same person signs back in with a working connection.

How to: sign out and decide what to leave behind

- Press Sign outfrom the menu.
- If you have data on the device, KoreLab tells you and shows how many groups there are.
- Leave the Delete my data from this devicebox unticked to keep it, or tick it to remove it.
- Confirm with Sign out.

What happens

- If you do nottick the box, the data stays and you find it again at your next sign-in, even offline. That is the right choice on your everyday computer.
- If you dotick it, your local copy is removed: catalog, Quality modules, invoices, accounting, customers and orders, along with the queue of changes not yet sent. Only the app settings and your company name stay, because they are shared with the device preferences (theme, language) and removing them would change the app for whoever uses it after you. That is the right choice on a borrowed or shared computer, or one you are about to hand over.
- Before deleting, KoreLab warns you if there are changes that have not reached your account yet: those exist only there and cannot be recovered. If you see them flagged and you care about them, sign out without ticking, sign back in with a working connection and let them send on their own.
- If you have nothing on the device, KoreLab asks nothing and signs you straight out.

Automatic cleanup

Local copies belonging to people who have not opened KoreLab on that device for **six months**are freed automatically, to avoid wasting space. Copies holding **changes not yet sent**are never touched, however old they are: those are deleted only if their owner asks.

Special cases

- Switching accounts on a device no longer requires any choice: nothing is shared between one account and another, so there is nothing to decide and the app opens straight away.
- If you use KoreLab on behalf of a client (Consultant plan), the client's data is notsaved on your device as if it were yours: it stays theirs.

ACCOUNT

Settings

Settings gathers everything about your account and the way KoreLab behaves: company details, language and start page, theme, default margins, visible modules, KoreLab AI and work preferences. You open it from the **Settings**menu entry (with the **Settings**label above it). On the left you find a bar with the sections; clicking an entry opens the corresponding panel on the right.

The sidebar entries are, in order:

- General— account, company name, language and start page
- Branding— logo, currency, decimal separator and billing details
- Appearance— color theme and compact mode
- Preferences— workspace behaviors (auto save, notifications, production mode)
- Product— preset margins and custom tags
- Preset texts— reusable phrases for the technical sheet and price list
- Modules— which areas of the app appear in the menu
- Subscription— active plan, limits and upgrade
- KoreLab AI— monthly budget and API keys

At the bottom of the bar you also find **Team**and **API**, marked **SOON**under the **Coming soon**heading: they are on the way and cannot be clicked yet.

A note on saving

Almost every section has a save button at the bottom (e.g. **Save settings**, **Save Branding**, **Save Theme**, **Save Preferences**, **Save**, **Save preset texts**). After the click, the button briefly shows a confirmation (e.g. **Settings saved**, **Saved**, **Theme saved**, **Preferences saved**). Changes are saved on the device and, where available, synced to your account: remember to press the button before switching sections.

General — account, company name, language, start page

The **General**section (titled **Account and Workspace**) shows your active plan in the top right, for example **FREE PLAN**or **PRO PLAN**.

How to do it

- Open Settings > General.
- In the Company namefield, type the business name you want to see in the app.
- From the Languagemenu choose between Italianoand English.
- From the Start pagemenu choose what to open at your next login: Dashboard, Products, Suppliersor Settings.
- Press Save settings.

What happens

- The Languagechange is immediate: the whole interface switches to the chosen language.
- The selected Start pageis the one that will open at your next login (below the menu you find the note "The page that will open at your next login").
- The Company nameis the same piece of data that also appears in the Branding section (Legal namefield): editing it in either place updates the same value.

Branding — logo, currency, separator, billing details

The **Branding**section (titled **Branding & Identity**) gathers the logo, the currency, the decimal separator and all the company's tax details.

How to do it — Logo

- Open Settings > Branding.
- Under Company Logopress Upload Logo (PNG, JPG)and choose the file.
- If a logo is already present, use Changeto replace it or Removeto delete it.
- Press Save Branding.

How to do it — Currency and separator

- From the Currencymenu choose the symbol: Euro, US Dollar, British Pound, Yen or Swiss Franc.
- From the Decimal separatormenu choose Comma — 1.234,56or Point — 1,234.56.
- Press Save Branding.

How to do it — Company and Billing Details

- Fill in the fields: Legal name, Legal form, VAT number / Tax code, SDI code, PEC, Email, Phone.
- Fill in the Registered Office Address: Street / Address, City, Province, Zip code, Country.
- Press Save Branding.

What happens

- The logo is used in the header of every PDF price list, and it also appears on the public personal-link pages your customers/suppliers/operators open (data and GDPR consent confirmation, HACCP tests): the subject and signature of those emails carry your Legal name instead of "KoreLab". A PNG with a transparent background is recommended, at least 300×100px and no heavier than 500 KB: beyond this limit the upload is rejected with the warning "Logo too large. Maximum 500 KB".
- The chosen currency and separator are applied to all prices and numbers shown in the app.
- The fields marked with an asterisk — Legal name, VAT number / Tax code, SDI code, PEC, Street / Address, City— are required for tax invoicing. Until they are filled in, they appear with a red border.
- Next to Company and Billing Detailsa status label appears: Completewhen all required fields are present, Incompleteotherwise, with the reminder "Fill in the company details to enable correct tax invoicing".

Tax configuration — the invoicing defaults

In the Company profile, under the billing details, the **Tax configuration**block gathers the values KoreLab applies automatically to documents, so you don't reset them on every invoice:

- VAT settlement— monthly or quarterly.
- Default document from delivery note— whether invoices from a delivery note start as a deferred invoice (TD24) or an immediate one (TD01).
- Stamp duty— settlement frequency (quarterly or annual).
- VAT advance method— historical, forecast, analytical or none.
- Advance rate %— the rate proposed on down-payment invoices (TD02).
- Reverse charge rate %— the rate proposed on purchase self-invoices and integrations when the received document doesn't state one.
- Pro-rata deductibility %— the annual VAT deductibility coefficient for exempt or mixed activities (empty = 100%).
- Cash-basis VAT— when on, the proposed VAT liability becomes deferred and you can note the option date.

These are all **defaults**: every value stays editable on the individual document. Some are already derived from the **tax regime**— with cash-basis VAT (RF16/RF17) deferred liability is automatic, and for the flat-rate regime (RF19) the N2.2 nature also appears in the receipts register.

Appearance — theme and compact mode

The **Appearance**section lets you change the app colors and the layout density.

How to do it

- Open Settings > Appearance.
- Under Interface Themechoose one of the previews: KoreLab (default)(warm beige, artisan style), Bakery(warm ivory, bakery) or Dark(dark, high focus). The active theme shows Active.

- Press Save Theme.
- In the Layoutbox, turn Compact Modeon or off with the toggle.

What happens

- The theme changes as soon as you select it; saving with Save Thememakes it permanent.
- Compact Modereduces spacing and card sizes for high-density workflows; the toggle takes effect as soon as you click it and does not require the theme save button.

Preferences — workspace behaviors

The **Preferences**section (titled **Workspace Preferences**) gathers three toggles that change the app's day-to-day behavior.

How to do it

- Open Settings > Preferences.
- Turn each toggle on or off.
- Press Save Preferences.

What the toggles do

- Auto Save— automatically saves changes to products and recipes after 2 seconds.
- Notifications— shows notifications for ingredient cost changes and production alerts.
- Production Mode— optimizes the workspace for production operations and hides retail prices.

Product — preset margins and tags

The **Product**section sets the margins applied to new products and your custom labels.

How to do it — Preset Margins

- Open Settings > Product.
- In the Wholesaleblock set Margin %and Agent fee %.
- In the Retailblock set Margin %and Agent fee %.
- Press Save.

What happens

- The margins set here are applied automatically to every newly created product (confirmed by the note "Applied automatically to every newly created product").
- The starting values are: Wholesale margin 30% and agent fee 10%; Retail margin 60% and agent fee 0%.

How to do it — Custom Tags

- Type the tag name in the New tag…field.
- Press Add(or the Enter key).
- To delete an existing tag, use the button next to it.
- Press Save(the same button saves both the margins and the tags; once saved it shows Saved).

What happens

- Tags are free-form labels for classifying products and recipes, and they act as a quick filter in the Products and Recipes pages.
- You can create at most 5 tags (each name up to 30 characters); once the limit is reached, the field for adding more disappears and the warning Limit of 5 tags reached.appears.

Plan notes

In the **Custom Tags**card, tags are indicated as available with the **PRO**plan.

Preset texts — reusable phrases

The **Preset texts**section lets you write the texts you use most often just once, so you can then pick them on the fly in the technical sheet, price list, delivery note, invoice and product master data fields. The fields are grouped into **Price list**, **Storage & Use**, **Packaging & Logistics**(e.g. Notes / additional information, Storage temperature, Shelf life / best-before date, Instructions for use, Packaging type, Material, Transport conditions), **Delivery note / Shipping**(Carrier, Appearance / packaging, Control / transport notes) and **Invoice**(Reason, Statement on invoice, Unit of measure on invoice line — the latter is picked in Product master data).

How to do it

- Open Settings > Preset texts.
- Find the field you want and press Add option.
- Type the text in the box that appears; you can add multiple options for the same field.
- To remove an option, use the button next to it.
- Press Save preset texts.

What happens

- Saved options become quick choices in the corresponding fields of the technical sheet and price list.
- On save, empty options are cleaned up automatically; any Manual templates saved separately are preserved and not deleted.

Modules — what to show in the menu

The **Modules**section decides which areas of the app appear in the menu, grouped by area: Base, Catalog, Production, Quality, Commercial, Tools, Account.

How to do it

- Open Settings > Modules.
- Use the toggle next to each module to turn it on or off.
- If you turn on a module that requires others, a confirmation request appears with the list of required modules ("… also requires: … . Enable all these modules?"): confirm to switch them all on together.

What happens

- Disabled modules disappear from the menu, but their data is never deleted: turn the module back on and you find everything again.
- Modules marked ALWAYS ONare system modules (e.g. Dashboard, Settings) and cannot be switched off: their toggle is disabled.
- Modules not included in your plan appear with the toggle off and locked, plus a "Requires …" line explaining what unlocks them (a higher plan, the Quality & Certifications suite or the add-on), with a direct link to the plans. Modules reserved for the Business plan also show the > Business badge.
- Below the name of modules that require others, the line "Requires: …" appears with the list of dependencies.
- Dependencies are handled automatically: a module required by other active ones cannot be disabled. If you try, a message like "Cannot disable … : it is required by … . Disable those modules first." appears.
- Modules with the PROlabel belong to the Pro plan (this is the case, for example, of KoreLab AI).

Subscription — plan, limits and upgrade

The **Subscription**section (titled **Billing & Plan**, subtitle "Manage your KoreLab subscription") shows the active plan, the usage limits and the upgrade option, if any.

How to do it

- Open Settings > Subscription.
- Read the active plan label in the top right (e.g. PRO PLAN).
- Check the three usage cards: Products, PDF Price Listsand Excel Import.
- If you are not on the Pro plan, press Upgrade >to go to the upgrade page.

What happens

- The cards show your plan's limits: on the Free plan, Products are capped at 5 and PDF Price Listsand Excel Importshow — Locked(they require the Starter or Pro plan); on higher plans the limits grow up to Unlimited.
- On the Pro plan the upgrade button does not appear; instead you see the message You are on the most complete plan. Everything is unlocked!
- For billing questions, the address info@cvproject.it is listed.

KoreLab AI — budget and API keys

The **KoreLab AI**section shows the AI assistant's usage and lets you enter your own API keys.

How to do it — check the budget

- Open Settings > KoreLab AI.
- Read the Monthly budgetbox: progress bar, amount spent out of the cap (e.g. €0,0000 / €5,00), how much is left and the percentage used.
- Keep an eye on the Total requestsindicator.

How to do it — use your own keys (BYOK)

- In the API Keys (BYOK)box, find the provider you want: Google Gemini, OpenAIor Anthropic (Claude).
- Paste the key into the field (placeholder Paste the API key…with an example of the provider's format) and press Save.
- If needed, press Testto check that the key works (result workingor error).
- To change an existing key use Replace; to remove it use Remove.
- Use the ²and ¼arrows to reorder the providers: the numbered order (#1, #2, #3) is the Priority order.

What happens

- Without keys of your own, the KoreLab key is used with a cap of €5 per month; the budget renews on the 1st of the month (note "Renews on the 1st of the month").
- When the budget runs out, new requests are blocked until the 1st of the following month (warning Budget exhausted — new requests are blocked until the 1st of next month.).
- By entering your own keys you switch to Your keys mode: no budget limit, and costs are charged to your account with each provider; KoreLab tries the providers in the order you set and, if one runs out of funds, moves on to the next.
- Keys are encrypted on the server (AES-256-GCM) and are never visible from the browser nor returned to the client.

Plan notes

KoreLab AI is available with the **PRO**plan. On a different plan, the section shows the upgrade invitation ("KoreLab AI is available with the PRO plan." with the subtext "Upgrade to access the intelligent food production assistant.") instead of the budget and keys.

ACCOUNT

Label logo

The **Label logo** is the mark KoreLab adds to product, lot and logistics labels. It is separate from the **Company Logo (PDF)**: thermal printers need a simple solid-black mark, while price lists and PDFs can use a colour logo.

How to do it

- Open Settings > Branding & Identity.
- Under Product lines, enter a name and press Create line. A line can exist before either logo is uploaded.
- In the line card upload the Line label logo (a simple black PNG/JPG) and, when needed, the colour PDF and price-list logo.
- Choose the label and PDF defaults separately, and select Small, Medium or Large for the label logo size.
- In Product Registry > Identity, link one or more lines. Create new line opens Branding directly from there.
- Press Save Branding.

What happens

- The black logo appears in previews, PDF labels and direct ZPL, TSPL and EPL prints without changing the printer or print method.
- The colour logo appears in price-list PDFs. Each print can still override the default manually.
- With exactly one product line KoreLab uses that line's logos automatically; with multiple or no lines it falls back to the defaults, so the original workflow keeps working.
- Files can be up to 500 KB. A thermal logo with no dark marks or too much detail is rejected.
- Product lines and their logo archive are a Business feature (maximum 5); label printing remains available on other plans. Business cards show line among data still to fill in as a non-blocking reminder.

ACCOUNT

Email sending (sender & SMTP)

KoreLab sends several emails **on your behalf**to external people: GDPR data-confirmation and consent requests to customers and suppliers (with their reminders), HACCP test invitations and training handouts to operators, product recall/withdrawal notices and — with invoicing — payment reminders and courtesy copies. They all use the **same channel**, which you can configure from **Settings > Email sending**.

How emails go out (with no setup)

- The displayed sender is «your Company name(via KoreLab)» — the recipient immediately understands who the communication comes from.
- Whoever replieswrites directly to YOUR email (the one in the Company profile), never to KoreLab: fill in the email in the Company profile to enable direct replies.
- The footer signature carries your company's details (company name, address, contacts).

How to: send from YOUR mailbox (SMTP)

- Open Settings > Email sending.
- Pick the provider preset — Aruba, PEC Aruba, Gmail (app password)or Other provider— or type the server manually. The port is fixed at 465(SMTPS): 25 and 587 are not supported.
- Enter the username(usually the full address), the passwordand the sender email. Gmail requires an «app password» (Google Account > Security > 2-Step Verification).
- Press OK Test the connection and save: KoreLab immediately sends a test emailto the address you entered — if the test succeeds the configuration is active; if it fails nothing is saved.

Copy to your company

Below the SMTP panel is the «**Copy to your company**»block: every email KoreLab sends on your behalf to a customer, a supplier or an operator can also reach your mailbox, as a **blind copy (Bcc)**and with the same attachment — the recipient never sees that address.

- A general switch «Receive a copy of outgoing emails»turns everything on or off, plus an address field: leave it empty and the copy goes to the Company profileemail (the page shows it to you); if there's no address at all — neither here nor in the Company profile — no copy goes out, and the page tells you so.
- Below it are eight families, each with its own switch: Documents sent to the customer(invoices, credit and debit notes, pro-forma), Payment reminders, Order confirmations, Purchase orders(to the supplier) and Transport documentsstart on; Consents and data confirmation, HACCP tests and handoutsand Recall noticesstart off, marked «multiple send».
- Why exactly these three start off: a single action can generate as many emails as there are recipients — a HACCP invitation to twenty operators, a recall to every customer of a batch — so turning them on means getting one copy per recipient, not just one.
- If you send from your personal SMTP mailboxand that server can't deliver to the copy address — this happens with domains that have accented letters, for example «società.it»— the copy doesn't go out, and KoreLab tells you so in the send's outcome message. On the KoreLab channel those addresses work fine.
- When the copy does go out, the outcome message confirms it: «A copy also reached you».
- It doesn't cover the Sharebutton: that opens your phone's own share sheet, and the email leaves from whichever mail app you pick, outside KoreLab — no copy can reach you on that channel.

What happens

- From then on ALL the emails sent on your behalf (consents, quizzes, handouts, recalls, reminders, courtesy copies) leave from your mailbox: the recipient sees your real address and your sent folder keeps the history.
- The password is never visible: it travels once to the server and is stored encrypted in the Vault; from Settings you can only disable the channel («Disable and forget the credentials»), which deletes the credentials and returns sending to the KoreLab channel.
- If your mailbox doesn't respondat send time, KoreLab automatically falls back to the «(via KoreLab)» channel and tells you: the email goes out anyway. If the mailbox times out(uncertain outcome), the send is NOT retried automatically — check your sent folder before trying again, to avoid duplicates.

For consultants

- The channel is also available on the Consultantplan: HACCP quizzes and handouts you send on behalf of your clients leave from YOUR firm's mailbox (subject and signature remain those of the client company, which owns the relationship with the recipient).

Plan notes

- The Email sendingsection is available on the Pro, Business, Qualityand Consultantplans. On every plan the default «(via KoreLab)» channel stays active, with replies going to your email.

ACCOUNT

Support

KoreLab Support is the section from which you send a support request to the team (bug report, suggestion, payment issue or general help). You find it in the menu under **Support**and you recognize it by the **KoreLab Support**title.

Local diagnostic preview

Before filling in the request, you can press **Open diagnostic preview**. KoreLab creates an in-memory JSON containing the app version, language, online/offline state, time, checksum, a local support code and only allowed technical codes from recent events. The preview excludes error text, stacks, routes, payloads, user data, tokens, headers, queries, documents and amounts. Opening it does not copy, download or send anything. The **Local support code** is derived from the checksum and only compares the same preview: it is not a ticket, does not let support retrieve the JSON and is copied only through **Copy code**. In the dialog, press **Copy JSON** to write exactly the displayed content to the clipboard, or **Download JSON**: korelab-diagnostic.json contains the same identical JSON and stays on your device. Neither action adds data, closes the preview or attaches anything to the support request. If the file cannot be created, KoreLab keeps the preview visible and shows a safe error; if the checksum cannot be created, it does not show the JSON.

How to do it

- Open the Supportsection from the menu.
- Fill in the Namefield (required, marked with an asterisk). Initially the field shows the placeholder "Your name".
- Check the Emailfield (required): it is already pre-filled with your account address. You can change it if you prefer to receive the reply at a different address.
- Choose the Categoryby pressing one of the available buttons: Bug / Error, Suggestion, Payment, General help. The selected button stays highlighted in blue; Bug / Erroris set by default.
- Write the Subject(optional): a short sentence describing the issue. It shows the placeholder "Briefly describe the issue".
- Fill in the Message(required): describe the issue in detail. If it is a bug, list the steps to reproduce it.
- Press the Send Support Requestbutton.

What happens

- If Name, Email or Message are empty, the warning "Fill in all required fields." appears and nothing is sent: go back and complete the missing fields. The Subject is not required.
- While the request is being prepared, the button shows "Opening email client…" and is temporarily disabled.
- KoreLab opens your email program with a ready-made message addressed to info@cvproject.it. The email subject is composed automatically in the form "[KoreLab PLAN] " followed by the Subject you wrote (if the Subject is empty, the category appears in its place).
- The email body is pre-filled automatically with your name, email, plan, category and the Message text.
- After about half a second you see the Request sent!confirmation screen, showing the email address where you will receive the reply and the time frame "within 24-48 business hours".
- To write another report, press Send another request: the form reopens with Subject and Message cleared, while Name and Email stay filled in.

Response times by plan

- Free plan: at the top of the section a yellow notice appears, with replies within 72 business hours and an invitation to move to Starter or Pro for priority support.
- Starter plan: light-blue notice with replies within 48 business hours.
- Pro plan: green notice with replies within 24 business hours and priority support.

Special cases

- Sending relies on the email program installed on your device. If nothing opens, write directly to info@cvproject.it: this address is always shown at the bottom of the form.
- At the bottom of the form, next to the Plan:label, your current plan is shown automatically (in uppercase). The same information

is included in the email, so the team can give you more precise answers.
- The response-time notice at the top of the section only appears for the Free, Starter and Pro plans. On other plans the form works the same way, but that notice is not shown.

Plan notes

- The plan only determines how quickly you get a reply (Free 72 hours, Starter 48 hours, Pro 24 hours): you can send support requests on any plan.

Notifications (Alerts center)

The Alerts center gathers all KoreLab's notifications (quality deadlines, non-conformities, warehouse below minimum stock, overdue collections, invoices rejected by SdI, reminders…) and lets you decide **per category**on which channels to receive them. Preferences are set in **Settings > Notifications**.

The four channels

- In-app— alerts appear in the dashboard ("What do I need to do today") and as numeric badges on the menu entries.
- Push— a system notification on your phone or your computer, even with KoreLab closed; it requires the device to have been enabled once from the Notifications on this devicepanel (see below).
- Email— a daily morning digest, sent only when there is something to report.
- Calendar— events created on your connected Google Calendar (e.g. the schedule's installments, notes with a due date).

The alert categories

- Quality — deadlines: recurring obligations, audits, expiring documents, calibrations, training, regulatory deadlines.
- Quality — non-conformities: open NCs, NCs stalled for more than 14 days, recalls.
- Warehouse: raw materials below minimum stock, expiring lots (FEFO).
- Administration — receivables & payments: installments to collect or pay that are overdue or due within 7 days, credit notes to offset, over-offset credits.
- Administration — invoices & SdI: invoices rejected by the Exchange System, transmission deadlines, TD16-19 integrations to send by the 15th of the month, supplier invoices to complete, delivery notes to invoice and tax thresholds (flat-rate scheme, OSS, stamp duty, VAT deductibility). Alerts carry a colored tag to tell them apart at a glance: TAX (red, legal deadlines), SdI (orange, channel and documents), THRESHOLD (blue, thresholds and checks).
- Reminders & notes: notes with a due date reached or near.
- Commercial: product cost and price changes.

Notifications on this device — do this once per device

The table's toggles decide **which**alerts you receive; the panel at the top of the page decides **whether this device can receive them at all**. These are two different things: until the device is enabled, the Push column produces nothing, no matter how many toggles are on.

The panel always shows the real state: whether the system permission was granted or denied, and the list of already subscribed devices (phone and browser, each with its date).

How to

- Open Settings > Notificationsand look at the Notifications on this devicepanel at the top.
- Press Enable on this device. The phone or the browser asks for permission: grant it.
- Press Send a test notification: if the notification appears, the device is fine.
- Repeat on every device where you want the alerts — the phone and the computer are enabled separately.

If the test does not arrive

- If the panel says Blocked by the browseror Blocked by the system, permission was denied in the past and the app cannot ask again: re-enable it in the browser settings for this site (padlock icon next to the address) or in the phone system settings, under the app's Notifications entry. Then come back and retry.
- If the panel says No subscribed device, the test has no recipient: press Enable on this devicefirst.
- If the test reports an error, the message says which device failed and why: that is the information to pass on to support.
- If nothing appears but the panel says Active, check that the device is not silenced or in "Do not disturb" mode.

How to: choose where to receive alerts

- Open Settings > Notifications.
- In the table, each row is a category and each column a channel (In-app, Push, Email, Calendar).
- Turn the toggles on or off: the choice is saved immediately.
- Cells with a "—" dash mean that channel is not available for that category (e.g. Calendar only makes sense for alerts with a date).

What happens

- The defaults mirror the app's historical behavior: push is already on for the Quality and Warehouse categories; for the other categories the extra channels are opt-in.
- Some alerts exist only in-app(e.g. audit windows, FEFO lots): push and email cover what the server can compute on its own.
- Administration alerts also appear as a badge on the Receivables & paymentsmenu entry and in the dashboard summary.

Channel requirements

- Push: the device must be enabled once from the Notifications on this devicepanel, both in the phone app and in the browser. Each device is enabled separately: enabling them on the computer does not enable them on the phone.
- Calendar: Google Calendar connected (from the Notes > Google Calendar section). Google access is in test mode: request the activation of your address from there — it is activated within 24 hours.
- Email: it arrives at your account's address, no setup needed.

Plan notes

- The Alerts center is available on all plans; the Administration categories produce alerts only if you use the Administration group modules (Business plan, currently in private testing).